

TOWARD A PASTORAL PRACTICE OF EFFICIENCY:
ADMINISTRATIVE PRACTICES AND PROCEDURES IN THE PARISHES
OF THE ROMAN CATHOLIC DIOCESE OF CLEVELAND

by
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Dedication

To my husband, David,
my love and my life,
and to our sons,
Matthew and Sam,
who have animated our family in wonderful and unimaginable ways.

Acknowledgements

I am deeply indebted first to my husband and sons for their unfailing and unflagging love and support of my theological education that spanned more than ten years' time. David, my husband, was my first inspiration and the first to encourage me to study what was dear to my heart and what I know to be foundational to life. I am deeply grateful to the faculty and staff of St. Mary Seminary and Graduate School of Theology who whispered to me along the way that I had, "a Doctor of Ministry in me." They are more friends than teachers to me. All of them are servant leaders in the truest sense of the word; each one has made Christ present to me. Fr. John Chlebo, my advisor, kept the faith in me even as I faltered along this journey with all sorts of excuses. Some were really good ones. His guidance and mentoring were flawless.

Thank you and God bless you always! You are always in my prayers!

Toward a Pastoral Practice of Efficiency:
Administrative Practices and Procedures in the Parishes
of the Roman Catholic Diocese of Cleveland

Abstract

by

Marie J. Kushner

Efficient parish administration, a fruit of leadership, will enhance and promote the mission of the Church through the effective use of talent, resources, and time. Pastors or administrators need not be technical experts but require a sufficient level of knowledge that would allow them to competently manage the operation of a parish and to identify people with the appropriate skill sets to delegate this work. In a 2017 survey of the pastors and administrators of the parishes of the Roman Catholic Diocese of Cleveland in northeast Ohio, the most pressing need, overall, was for resources and tools for managing personnel. Besides human resources, other topics requiring competency for parish administration include leadership (emotional intelligence), finances (fundraising, budgeting, investment, and cost savings), assets (property, buildings, furnishings, and equipment), liabilities (risk management, internal controls, insurance, and bank loans), and image (marketing, public relations, and social media). In an environment of constrained pools of vocational and financial resources, core competencies must be leveraged. The core competency of clergy is the ministry to people. Most administrative functions should, therefore, be delegated to those trained to handle them, specifically lay personnel. Efficiency is elemental of good stewardship. The Church deserves to be managed with the highest level of professionalism.

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Chapter One

Introduction

Context

The ministerial context for this project is the parishes of the Roman Catholic Diocese of Cleveland in northeast Ohio (hereafter, Cleveland's parishes). Cleveland's theological seminaries do not train people in parish administration. Unless they come to the seminary credentialed with degrees, men are ordained to the priesthood with little in the way of "business basics." Yet, in some cases, priests are quickly called upon to lead parishes as pastors. Quite often, parishes are multi-million dollar operations. By any measure, stepping into parish leadership for the first time is an intimidating prospect, even for those with some degree of administrative literacy. Ideally, however, expertise is already available at parishes in the way of a finance council, bookkeepers, accountants, or business managers. Pastors should not be called upon to be financial wizards but should have sufficient knowledge to be able to appraise and evaluate people and situations related to the finances and administration of a parish. Their focus as leaders must be on people and organizational oversight and not the administrative details of their parishes.

Although the context is local, an eye must be kept on the "bigger picture." The activities of other dioceses, particularly in the United States, should be reviewed and taken into account for two reasons. First, to serve as a benchmark for what types and levels of information are needed and the type of training that has been developed to

address the knowledge gaps. Second, to take what is working in these locales and put them to use in Cleveland. To re-author procedures and learning materials is inefficient.

Resume

My professional background is in business. I graduated from Cleveland State University in 1983 with a Bachelor's degree in Business Administration, having majored in accounting. I am a Certified Public Accountant, licensed by the State of Ohio, and am required to continue my education. Each year I am obliged to lead or attend at least 40 hours of classes related to my profession in order to maintain my certification. For 30 years, I worked in the Tax Department of The Sherwin-Williams Company in various disciplines of tax: federal and state income and state sales and use taxes. (I retired from the Company on June 30, 2017.) I was responsible for preparing and filing tax returns, defending the returns as filed when tax authorities came to review them, hiring and developing people, planning and implementing strategies to minimize tax outlays, and researching and communicating tax law to non-professionals. During the last few years there, much of my time was consumed with matters pertaining to efficiency and automation. I was charged to do more with less; to be more efficient.

At various times during my tenure at Sherwin-Williams, I was also a part-time student. I earned a Master's of Business Administration from Case Western Reserve University in 1991 and a Master of Arts from Saint Mary Seminary and Graduate School of Theology in 2012.

During this same time, I involved myself in my parish, St. Mary of the Assumption in Cleveland, as a volunteer, usually in some type of role related to finances. (It seems as if much of this work came in my direction when it was learned that my

profession was in the field of accounting.) I was treasurer for our Saturday morning Slovenian language school for a few years. I also served on the Finance Council in the capacities of member and chairperson for about eight years. These parish experiences, for me, brought to the fore the potential for the improvement of administrative efficiencies with, in some cases, minimal investment.

Rationale

Overview

My project proposal was to marry my MBA and MA degrees to enhance the administrative efficiency of the parishes in the Diocese of Cleveland. Although the Church's mission is in service and that is to preach the Gospel to the ends of the earth, on a macro level it nevertheless operates much as any large business enterprise does with assets, liabilities, income, expenses, people, lobbying clout, world-wide presence, information and communication networks, etc. In fact, the Church is, according to Kerry Robinson of the Leadership Roundtable, "...the largest global humanitarian network in the world."¹ The parishes of the Diocese of Cleveland operate in a similar way, only on a smaller scale.

The Church and Cleveland's parishes have lessons to learn from business, just as business has much to learn from the Church. The knowledge and the practices in the for- and not-for profit business sectors that translate to the context of parish activities should be identified, reviewed, and implemented where practicable. There is not the need for the

¹ U.S. Catholic interview, "Laypeople are creating a blueprint for the church's success," *U.S. Catholic* 80, no. 10: 28-32 (October, 2015), <http://www.uscatholic.org/articles/201510/laypeople-are-creating-blueprint-churchs-sucess-30396> (accessed October 12, 2015), 1.

sophisticated, high finance of an investment bank but the type of information that allows for better decision-making at the parish level. At baseline, good management is good stewardship.

The Church's mission is always enhanced by good management and diminished by bad. In the worst case, it is negated with the bad press garnered from the news of theft or embezzlement. Further, given constrained material and human resources, specifically the shortage of priests, the church must find ways to make do with less; to be more efficient. Efficiency is elemental of good stewardship.

The Latin word, "*efficere*," has a meaning of, "to carry out." The words, effect, effective, efficiency, efficacy, efficacious, and efficient all have their roots in "*efficere*." According to Webster's dictionary, to be efficient is to have produced a desired change, result, or product with a minimum of effort, expense, or waste. To be effective is to produce a definite or desired result that makes an impression. Efficiency is a critical key of this project. Ideally, the outcome would lead to a more efficient use of talent, resources, and time at the parish level. It is to be able to do more with less in contexts of constrained resources, a phraseology that is all too familiar to those of us with backgrounds in business.

With shortages of vocations to the ordained priesthood, priests' time spent with certain administrative functions should be minimized or even eliminated. This would serve to leverage core competencies, that is, an efficient use of talent. "Leverage" and "core competencies" are terms borrowed from the business world and are translatable to church administration. "Leverage" is influence or advantage used to achieve a desired

result. “Core competencies” are the collective knowledge, learning, experience, or capacity of an organization.

The word, “lever,” is both a noun and a verb. It is a tool and it is used to describe the action of moving or lifting. It is a remarkable tool in that it can be used to efficiently move large objects or quantities with degree of effort that is significantly less in comparison. Archimedes, an ancient Greek philosopher and mathematician, “...noticed that if a lever was balanced in the right place, on the right fulcrum, it could move proportionally much greater weights than the force actually applied.”² “Leverage,” is also a noun and a verb. It is synonymous with financial debt and to “leverage” is to use some sort of resource in order to achieve a desired result. In the present context, leverage is to take advantage of knowledge, experience, and resources related to administrative practices in order to better move the Church’s mission. In the words of Archimedes, “Give me a lever and a place to stand and I will move the world.”³ Used allegorically, the balancing point, fulcrum, and lever are the work of the Church. We must know how and where to place ourselves and use the Church as a fulcrum in order to lever the people of God toward divinity.

In the world of business, a core competency is a capability or advantage that distinguishes one enterprise from another, namely, a competitor. Core competencies are enhanced as they are applied and shared across an organization. They also serve as guides or parameters. Core competencies should allow an organization to target and expand into underserved areas that would provide a benefit or meet a need of people.

² Richard Rohr, *A Lever and a Place to Stand: The Contemplative Stance, The Active Prayer* (Mahwah, NJ: HiddenSpring, 2011), 1.

³ *Ibid.*

Competitors may find it hard to replicate a given organization's core competencies. The identification of core competencies is an exercise of honest self-examination.

Essentially, in the words of an ancient Greek aphorism, it is "to know thyself."

Walmart's unique strength is managing a complex supply chain, Procter & Gamble regularly brings winning innovations to market, Sherwin-Williams is renowned as a coatings manufacturer and retailer, and Apple's expertise is in software and hardware. These companies use their resources in the right places, at the right time, and in the right amount. Not only do they seek out ways to augment and leverage these competencies, they also examine their processes and outsource non-core activities. As examples of this, a number of years ago, Ford and General Motors spun off their auto parts units Visteon and Delphi, respectively. A core competency of the Catholic Church is to bring the message of Jesus Christ to the world in order to make disciples of all nations. The Church should know herself well enough to know that administration is not a core competency. The notion of "core competency" may be applied on a personal level in much the same way: through honest self-awareness and self-assessment. As a group, priests' core competency is in ministry: to make present the person of Jesus Christ to people. It is not organizational administration.

Always cognizant of shrinking or unpredictable pools of resources, this project will seek to assist pastors in the acquisition, management, and safeguarding of resources in the context of parish administration. "Resource management" is concerned with the efficient and effective deployment of an organization's resources when and where they are needed. It includes decisions related to leadership (emotional intelligence), finances (fundraising, budgeting, investment, and cost savings), human resource skills (clergy,

religious, employees, and volunteers), assets (property, buildings, furnishings, and equipment), liabilities (risk management, internal controls, insurance, and bank loans), and image (marketing, public relations, and social media). Resource management is grounded in wisdom and practicality. Examples include having supplies (paper, pens, paperclips, etc.) in sufficient quantity for the operation of a parish office, maintaining cash balances in funds that earn a higher rate of return than a checking account, and making sure that people have assignments that keep them busy with the goal of little to no downtime. When it comes to personnel, care must also be given to match skill and tenure to the tasks at hand. So the pastor should not be weeding flowerbeds and the volunteer that answers the telephone should not be compiling financial statements. The pastor's focus should be on his flock and day-to-day administrative details should be delegated to those with the competencies to handle them.

Time is God's gift to humanity. It is a precious asset and a finite resource and must be used with prudence and wisdom. To be efficient with the use of time is to plan, prioritize, and control activities and oneself. Ample consideration must be given to questions pertaining to allocation, such as, "When should it be done, who is best suited to the task, and how long should it take?" To borrow from the world of business, time should be managed. "Time management" is to take care of, and make decisions about, the best use of the gift of time. To attend to time is to attend to people and to oneself. Work should be allocated to those best suited for it. Ability, experience, and salaries must be taken into account. A company's CEO should not be sorting and distributing mail. Those that don't attend to the tasks assigned to them will invariably overburden a colleague or manager who will have to step in to see to its completion. This of course is

not applicable to learners or to those whose capabilities are limited. People who don't make wise use of their time are taking something that is not theirs to take. It is stealing. To attend to time is to be productive. There is a direct correlation between efficiency and productivity. Experience or lots of practice should have a positive impact on efficiency and lead to an increase in productivity. Those that are productive are able to step back and establish priorities or work plans based on deadlines, impact, urgency, and dollars. The ability to focus and not be distracted from the work at hand is also essential to quality outcomes. This may mean that quantity may not be as important as quality. Many workers are needlessly distracted by phone calls or emails, including those that are work-related. Personal awareness is critical to improved productivity.

Theological Foundations and Theoretical Frameworks

A theology of efficiency centers on the dignity and the responsibilities of the person who, created in the image and likeness of God, is called to participate in the on-going creative activity of God and to safeguard the works of creation in order to bring about the Kingdom of God.

The responsibility of an ethical worker to his or her employer is productivity that comes of, or is a function of, efficiency. The same may be said of volunteers whose time is mostly their own to give. Their responsibility is to ensure that they are not a cause of inefficiency. A volunteer, for example, whose penchant for conversation will be the cause of an employee's inability to complete the tasks assigned to them. Within Catholic social teaching, efficiency is elemental of the principle of stewardship. Stewardship relates to the safeguarding and responsible use of material and human resources. Stewardship is also the generosity of time, talent, and treasure. The USCCB noted in its teaching on stewardship that Christian stewards, "...receive God's gifts gratefully,

cultivate them responsibly, share them lovingly in justice with others, and return them with increase to the Lord.”⁴ It is all encompassing. It is to model one’s life after the life of Jesus.

This project will use various resources as foundations and framework:

- A. Scripture. Stewardship has its Scriptural foundation in the creation accounts of Genesis. As God created the world and admired the handiwork, the repeated refrain throughout the first account in Genesis is, “God saw how good it was.” Good! It is an unobtrusive word but one that has such profound implications. Creation is God’s work and humanity is called to share in this work as co-creators. Within these biblical accounts, the exegetical themes of trust and disobedience will be explored. In Matthew’s Gospel, the Parable of the Talents offers unparalleled insights into leadership, workers, and work. It offers the notion that to be reliable with smaller responsibilities will lead one to gain greater responsibilities. With gifted and efficient wordsmithing, St. Matthew offers Jesus’ lessons on these and other matters on both vertical and horizontal planes. Its message is primarily eschatological. “The parable of the talents...is the third in a series of parables dealing with the proper attitude to and behavior in the face of the coming of the Son of Man.”⁵ This message is couched in the story of a master and his servants

⁴ United States Catholic Conference of Bishops, “Stewardship,” USCCB, Washington, DC, 2015, <http://www.usccb.org/beliefs-and-teachings/what-we-believe/stewardship/index.cfm> (accessed August 2, 2015), 1.

⁵ Daniel J. Harrington, SJ, *The Gospel of Matthew*, volume 1 of *Sacra Pagina Series*, ed. Daniel J. Harrington, SJ (Collegeville, MN: Liturgical Press, 2007), 353.

and treasure. It is allegorical in that an insight is given about God through the character of the master. As is characteristic of Jesus' parables, the listener or reader is provoked to discomfort. He or she is drawn into the story and invited to conversion. It is a story of the value of productive work. Ultimately, it is the story of humanity's journey of divinization. "Faithful use of one's gifts will lead to participation in the fullness of the kingdom; lazy inactivity, to exclusion from it."⁶

- B. Code of Canon Law as it pertains to the temporal goods of the Church.
- C. Church documents. Several documents will be analyzed to ascertain the current mind of the Church. Specific focus will be given to the documents of the Second Vatican Council as foundational to what the present mindset is or should be, especially the role of the laity as articulated by *Lumen Gentium* and *Apostolicam Actuositatem*. Current papal encyclicals will also be considered.
- D. Diocesan Policy and Procedures. These procedures will be reviewed to ensure that there are no conflicts in terms of information and learning materials that will be developed in this project.
- E. Relevant current literature. Books and articles that review and discuss best practices when it comes to church administration. A review of modern business practices and procedures that may be appropriated for the work of Church administration. To understand how and why mistakes and irregularities occurred in the past.

⁶ Erasmo Leiva-Merikakis, *Fire of Mercy, Heart of the Word: Meditations on the Gospel According to Saint Matthew, Volume Three (Chapters 19-25)* (San Francisco: Ignatius Press, 2012), 801.

Probes and Benchmarking Within the Catholic Community

This project's viability will be gauged by probing the experiences of other organizations within the Catholic community. Alongside this, those that found success will be used to validate the need for this project and to evaluate its outcomes within the Cleveland Catholic community.

“Probes” and “benchmarks” are vocabulary words that are rather new to the church community but essential to any business project. It is essentially the due diligence that is necessary to the success of a project. It is to ask questions of others and to seek out similar projects in other contexts to make sure that mistakes are not made or repeated.

A probe is an exploratory survey and would include the review of published information (books, journals, websites, etc.) and informal dialogues specifically pertaining to project viability. What should emerge from this exploration are potential areas of need, if any, that would be pertinent to this project. To this end, *A Pastor's Toolbox: Management Skills for Parish Leadership* has been a foundational resource for this project. In this and other reading, the issue of the lack of financial knowledge or expertise has been a repeated refrain. Surprises came within the category of the safeguarding of assets. Theft (embezzlement, etc.) runs rampant in churches. Given the ecclesial context, it seems to be under-reported and all-too-often forgiven due to a climate of trust.

Benchmarks, or comparisons, are used to gauge the quality of a given outcome. Specifically, to identify procedures and resources that work (and do not work) and parameters that would signal success. The ideal would be to locate a “case study” of outcomes within a diocese where administrative training and guidance is offered or even required of those leading parishes. This would include an analysis of the situation before implementation and an analysis of the post-implementation situation. The Leadership

Roundtable's website and The Wall Street Journal have provided leads. The Wall Street Journal reported on March 10, 2015 that the Archdiocese of New York is launching a program of formal training in church management for lay people that includes tuition subsidies. The online program (reviewed for this project) is sponsored by Villanova University. Archbishop Dolan is seeking to free clergy for pastoral work. What remains unknown at this time is the identity (if there is one) of a diocese that has fully implemented financial standards and training that would be able to provide "before and after" scenarios as a testament (hopefully) of why such changes should be implemented in the first place.

Pastors will not have abdicated their role as the temporal leader of their parish communities by delegating the day-to-day administration (the work) of a parish while retaining oversight (responsibility). Delegating is not abdicating.

Initial Project Proposal: Thesis, Objectives, and Outcomes

The development of learning materials that introduce or hone skills related to the efficient administration of a parish in order to make the best use of competencies, resources, and time for the betterment of a parish (and wider) community through the promotion of the mission of the Church.

My initial project proposal was to produce teaching materials, including oral presentations and written guides, that would be informative and useful to current and future parish leaders and administrators in the Diocese of Cleveland. These were to be concise, easy to understand learning materials, such as *PowerPoint* presentations, that would introduce or hone administrative skills for an intended audience having little to no business background toward an outcome of a more efficient use of talent, resources, and time. The materials would have been in accord with Canon Law, Catholic teaching, and the policies of the Diocese of Cleveland. Examples of the topics that I had planned to

cover included the nature of leadership, the need for and responsibilities of parish and finance councils, creation of staff job descriptions, staff evaluation and development, elements of a valid contract, understanding financial statements, taxation of non-profits at the federal and state level, risk management, technology, investment, and fundraising.

I had identified a test group through my classmate, Sherri Moyer, a graduate of St. Mary's Seminary and Graduate School of Theology, who had done preliminary groundwork for a class that was to be offered during the Spring, 2017 semester called, "The Theology of Managerial Stewardship." Sherri invited me to collaborate with her by presenting, as "subject matter expert," two class sessions devoted to finance. This would have been an excellent forum to test the materials that I had planned to develop. As I concluded the writing of the theological chapter for this thesis, it became apparent that the class would not be held. A critical component of my original project proposal had essentially evaporated.

Final Project: Plans Scattered and Redeveloped

The development of recommendations related to the efficient administration of a parish in order to make the best use of competencies, resources, and time for the betterment of a parish (and wider) community through the promotion of the mission of the Church.

Based on Sherri Moyer's probes and others that I informally conducted, the need for guidance pertaining to parish administrative matters remained apparent and even pressing. These probes moved me to forge ahead with the topic that I originally proposed. The centerpiece of this project, however, was adjusted to be a survey of the pastors and administrators of Cleveland's parishes rather than the focus groups of pastors that I originally envisioned. The survey's target audience (158) and the number of respondents (68) were much larger than a focus group would have been. Its completion

took the participants less time (about 11 minutes) than getting to and from a meeting location. The outcome of the survey indicated that my original proposal of a test group of students was not entirely appropriate either. As it turns out, the depth of need is much greater than a seminary class of 15 weeks and wider than my skill set. Rather than a project implementation, I will offer a series of proposals based on:

- The strengths and weaknesses of Cleveland's Diocesan parishes in the area of administration.
- The general level of knowledge and confidence held by Cleveland's pastors and administrators with respect to parish administration.
- The impact of the gifts of the laity on administration.
- The level of knowledge for a pastor's competent parish administration.
- The type of knowledge needed for a pastor's competent parish administration.
- The degree of a pastor's involvement that is needed for efficient administration.

Time Line

A. Spring 2016:

1. Finalized Prospectus and sought and obtained project approval on March 9, 2016.
2. Called Finance Office, Diocese of Cleveland, for copy of Diocesan financial policies and procedures: Gerald Arnold at 216.696.6525, x2170 and Jim Gulick at 216.696.6525, x3950. Policies and procedures are available through the Diocesan website and accessible to anyone.
3. Talked to Fr. Joe Hilinski of the Office of Continuing Education who indicated that there were no training programs for new pastors available through the Office.
4. Attended NADD conference in Galveston/Houston. The theme of conference was of servant leadership with Chris Lowney as keynote speaker. The talk was summarized and included in this manuscript as Appendix D.
5. Continued to read and accumulate materials relevant to project and add to annotated bibliography: articles, books, etc.
6. Began outline of theology chapter.

B. Summer 2016:

1. Researched material relevant to the development of Scriptural basis for a theology of efficiency grounded in Catholic social teaching (stewardship).
2. Researched documents of Vatican II, Canon Law, papal encyclicals, etc.

3. Continued to read and accumulate materials relevant to project and add to annotated bibliography: articles, books, etc.
 4. Finished outline of theology chapter.
- C. Fall 2016/Spring 2017/Summer 2017:
1. Wrote Ch. 2 Theological & Theoretical Considerations of Administrative Efficiency.
 2. Continued to read and accumulate materials relevant to project and add to annotated bibliography: articles, books, etc.
- D. Fall 2017:
1. Wrote Ch. 3 Survey Methodology and Development.
 2. Deployed survey of parish pastors and administrators via *SurveyMonkey*.
 3. Reviewed and analyzed survey results.
 4. Began the writing of Ch. 4 Survey Results and Analysis
- E. Spring 2018:
1. Finished writing Ch. 4 Survey Results and Analysis.
 2. Wrote Ch. 5 Pastoral Reflections and Recommendations (conclusion).
 3. Completed the review and final edit of Doctor of Ministry project.
 4. Scheduled colloquium.
 5. Delivered manuscript to advisor and readers on April 2, 2018.
 6. Developed *PowerPoint* presentation for colloquium scheduled for April 23, 2018 at 4:15pm.

Appendices

- A. Survey of parish pastors and administrators: Parish Administration in the Catholic Diocese of Cleveland.
- B. Responses to survey of parish pastors and administrators: Parish Administration in the Catholic Diocese of Cleveland.
- C. *Excel* spreadsheet detailing responses and additional analysis of the survey, Parish Administration in the Catholic Diocese of Cleveland.
- D. Summary of the keynote address delivered by Chris Lowney during the NADD 2016 Annual Meeting, "Deacon: Servant Leader in a Servant Church."

Chapter Two

Theological and Theoretical Considerations of Efficient Administration

A Pastoral Practice of Efficient Administration

It is with a sense of wonder and gratitude that we survey the marvel and goodness of God's creation. Humanity is the crown of that creation. Each person is endowed with a unique array of abilities, gifts, and talents that never was or ever will be replicated again. Each person is called to do God's will through his or her own distinctive sacred vocation. In the words of Blessed John Henry Newman, "I am created to do something or to be something for which no one else is created; I have a place in God's counsels, in God's world, which no one else has; whether I be rich or poor, despised or esteemed by man, God knows me and calls me by name."⁷ God, too, provided for humanity's every need to the tiniest detail and seeks relationship with everyone. For this Jesus came and walked with humanity to lay a path to union with God and to direct his followers to preach this gospel to the nations.

Through God's magnanimous providence, a Church, an organ of authority, was founded for the reception, preservation, and transmission of divine revelation. The Church, in the language of humanity, may be defined as an "institution" as it is devoted to the promotion of the message of Jesus Christ. Although, "The Church cannot be

⁷ Bernhard Meuser, project manager and ed., *DOCAT: What to do? The Social Teaching of the Catholic Church*, Clara Steber, project assistant (San Francisco: Ignatius Press, 2016), 16.

reduced to its institutional structures...it cannot exist without them.”⁸ She must be an institution in order to have a presence in, and carry out her mission to, the world.

So Cleveland’s churches are not franchises and the pastors of these parishes are not branch managers. Employing Karl Rahner’s “parochial principle,” a way of articulating parishes’ theological structure, the parish is more than just a transitory local representation of the universal Church. It is, rather, “the highest degree of actuality of the total Church.”⁹ Radically, the parochial principle means that the parish is the “event” of the Church; the place where Christians encounter God. The pastor, and those that work with him, must connect their work to the faith of the parishioners. It may therefore be said that the parochial principle is at the heart of a theology of church administration.

Every call to work or vocation is of divine origin and each vocation has equal dignity before God. Those called to the work of church leadership and administration are called to a ministry of service. The focus of service is always the other and never the self. Within the context of this project, “other” will include organizations as well as individuals. Entities, such as churches, have need for pastoral care as much as any individual! The leaders and administrators of the church require the heart of a steward.

In the context of shrinking or unpredictable pools of material and human resources, the work of administration must be efficient. Efficiency is good stewardship. The outcome or results of any person’s labor must be produced with a minimum of effort, expense, or waste.

⁸ Donald Senior, CP, *The Gift of Administration: New Testament Foundations for the Vocation of Administrative Service* (Collegeville, MN: Liturgical Press, 2016), 4.

⁹ Mark F. Fischer, “The Donatist Controversy and a Local Theology of Church Management, in *The Parish Management Handbook*, ed. Charles E. Zech (Mystic, CT: Twenty-Third Publications, 2003), 20.

The thesis of this project is that efficient parish administration, a fruit of leadership, will enhance and promote the mission of the Church. This chapter, providing the theological foundations for this thesis, is divided into three sections. The first section will survey the biblical stories of administration and leadership. Section two will touch on the current mind of the Church and will provide a theoretical framework for leadership and administration that falls within the body of Catholic social teachings. It will include a review of pertinent sections of the documents of Vatican Council II, the Code of Canon Law, and the writings of theologians. The third section will summarize a selection of the more recent literature, including books, journals, and news articles. The theology of this chapter is written from the perspective of the Roman Catholic tradition. Unless otherwise indicated, Scriptural texts in this work are taken from the *New American Bible* (NAB).

Biblical Foundations of Leadership and Administration

The work of administration is a true spiritual gift and a genuine ministry of the church. "...Administration has been seen as a ministry from the time of St. Paul's writings and throughout the history of the Church."¹⁰ While this charism does not hold the kind of prominent place in the collection of Christian ministries that preaching, teaching, and healing do, it nevertheless makes present the Gospel message when exercised with virtue. The etymology of the word, administration, reveals what is at the heart of its work. " 'Administer' comes from Latin, combining the word 'serve'

¹⁰ Ann M. Garrido, *Redeeming Administration: 12 Spiritual Habits for Catholic Leaders in Parishes, Schools, Religious Communities, and Other Institutions* (Notre Dame, IN: Ave Maria Press), x.

(*ministrare*) and the prefix ‘to’ (*ad*), and means to offer aid or service or direction to someone.”¹¹ There is, therefore, no dichotomy between administration and ministry.

Some would draw boundaries between the work of administrators and leaders, but, in truth, there is overlap, nuance, and influence. It may be said that leadership tilts in the direction of visionary and influential and that administration is the execution of that vision, but leaders benefit from administrative skills and administrators benefit from visionary spirit. In fact, without the discipline that emerges from the “first” leadership, the leadership of self, little or no work is accomplished. In this project, therefore, they will be held together.

The functions of leadership and administration are rooted in, and are genuine expressions of, Sacred Scripture and the tradition of the Catholic Church. Little has been specifically written that connects the topics of spirituality and administration or leadership, with the notable exceptions of the recent works of Ann Garrido and Donald Senior. When one is attentive, however, to the task of gleaning biblical connections to them, then timeless foundational wisdom is the prize. Below are a selection of biblical stories and persons that offer lessons of administration and leadership that are relevant to the present day.

God Brings Order out of Chaos (Genesis 1:1-2:3)

In the beginning, when God created the heavens and the earth, the earth was a formless wasteland, and darkness covered the abyss, while a mighty wind swept over the waters. Then God said, “Let there be light,” and there was light. God saw how good the light was. God then separated the light from the darkness. God called the light “day,” and the darkness he called “night.” Thus evening came, and morning followed-the first day.

¹¹ Senior, *The Gift of Administration*, xxii.

Then God said, "Let there be a dome in the middle of the waters, to separate one body of water from another." And so it happened: God made the dome, and it separated the water above the dome from the water below it. God called the dome "the sky." Evening came, and morning followed-the second day.

Then God said, "Let the water under the sky be gathered into a single basin, so that the dry land may appear. And so it happened: the water under the sky was gathered into its basin, and the dry land appeared. God called the dry land "the earth," and the basin of the water he called "the sea." God saw how good it was. Then God said, "Let the earth bring forth vegetation: every kind of plant that bears seed and every kind of fruit tree on earth that bears fruit with seed in it." God saw how good it was. Evening came, and morning followed-the third day.

Then God said: "Let there be lights in the dome of the sky, to separate day from night. Let them mark the fixed times, the days and the years, and serve as luminaries in the dome of the sky, to shed light upon the earth." And so it happened: God made the two great lights, the greater one to govern the day, and the lesser one to govern the night; and he made the stars. God set them in the dome of the sky, to shed light upon the earth, to govern the day and the night, and to separate the light from the darkness. God saw how good it was. Evening came, and morning followed-the fourth day.

Then God said, "Let the water teem with an abundance of living creatures, and on the earth let birds fly beneath the dome of the sky." And so it happened: God created the great sea monsters and all kinds of swimming creatures with which the water teems, and all kinds of winged birds. God saw how good it was, and God blessed them, saying, "Be fertile, multiply, and fill the water of the seas; and let the birds multiply on the earth." Evening came, and morning followed-the fifth day.

Then God said, "Let the earth bring forth all kinds of living creatures: cattle, creeping things, and wild animals of all kinds." And so it happened: God made all kinds of creeping things of the earth. God saw how good it was. Then God said, "Let us make man in our image, after our likeness. Let them have dominion over the fish of the sea, the birds of the air, and the cattle, and over all the wild animals and all the creatures that crawl on the ground." God created man in his image; in the divine image he created him: male and female he created them. God blessed them, saying to them: "Be fertile and multiply; fill the earth and subdue it. Have dominion over the fish of the sea, the birds of the air, and all the living things that move on the earth." God also said: "See, I give you every seed-bearing plant all over the earth and every tree that has seed-bearing fruit on it to be your food; and to all the animals of the land, all the birds of the air, and all the living creatures that crawl on the ground, I give all the green plants for food." And so it happened. God looked at everything he had made, and he found it very good. Evening came, and morning followed-the sixth day.

Thus the heavens and the earth and all their array was completed. Since on the seventh day God was finished with the work he had been doing, he rested on the seventh day from all the work he had undertaken. So God blessed the seventh day and made it holy, because on it he rested from all the work he had done in creation.

God had a purpose and a plan for which God created and continues to create. And God worked the plan to bring things into being and order out of chaos. From the perspective of efficient administration, this passage is significant in that this Priestly account of creation unfolds in a logical, symmetrical, and thoughtful manner. “The systematic progression from chaos to cosmos unfolds in an orderly and harmonious manner through a series of six successive and equal units of time.”¹² There is also a progression from the separation and creation of inorganic matter, then organic matter, and finishing with humanity. “God is an efficient worker, first preparing the planet for life and community and then creating community that can be sustained by the earth.”¹³ The cadence of this passage is deliberate and measured. There was no sense of impatience or disappointment. Always, there was a pause in the work of the day to take satisfaction and delight in it. The world emerges as a place of goodness and beauty. “As liturgy, this poetry invites the congregation to *confess and celebrate* the world as God intended it.”¹⁴

Equally significant in this pericope is the pervasive concern for a relationship of integrity from every perspective. God spoke and it was exactly so. “Fundamental to Genesis is the divine creative activity, which involves not only the beginnings of the

¹² Nahum M. Sarna, *The JPS Torah Commentary: Genesis* (Philadelphia: The Jewish Publication Society, 1989), 4.

¹³ Michael E. Cafferky, “Toward a Biblical Theology of Efficiency,” *Journal of Biblical Integration in Business*, 16(2): 45.

¹⁴ Walter Brueggemann, *Genesis, Interpretation: A Bible Commentary for Teaching and Preaching*, ed. James L. Mays (Atlanta: John Knox Press, 1982), 30.

cosmos and all of its creatures but also God's continuing ordering and blessing activity within and without Israel."¹⁵ God's presence and activity has the world as His matrix. It is an ongoing project. "God...graciously opts instead for a more vulnerable, long-term engagement, working from within the very life of the world itself."¹⁶

Then God entrusts the world to the care of those that He created in His own image and likeness; the crescendo of His creation. "Human beings are to enjoy a unique relationship to God, who communicates with them alone and who shares with them the custody and administration of the world."¹⁷ Humanity is called to continue creative activity in the divine image and likeness that is characterized by careful attention to relationship, harmony, balance, and order. Equally important is the time taken for contemplation and gratitude; to delight in, and take rest from, the labors of the world.

Work was a Part of God's Plan from the Beginning (Genesis 1:28-30)

God blessed them, saying to them: "Be fertile and multiply; fill the earth and subdue it. Have dominion over the fish of the sea, the birds of the air, and all the living things that move on the earth." God also said: "See, I give you every seed-bearing plant all over the earth and every tree that has seed-bearing fruit on it to be your food; and to all the animals of the land, all the birds of the air, and all the living creatures that crawl on the ground, I give all the green plants for food." And so it happened.

(Genesis 2:15)

The LORD God then took the man and settled him in the garden of Eden, to cultivate and care for it.

¹⁵ Terence E. Fretheim, *The Book of Genesis: Introduction, Commentary, and Reflections*, The New Interpreter's Bible Series, Volume 1 (Nashville: Abingdon Press, 2002), 337.

¹⁶ Ibid.

¹⁷ Sarna, *The JPS Torah Commentary: Genesis*, 11.

God's creative activity, is the first work and a prototype for all that would follow. Work was not meant to be a punishment for sin but was a part of God's plan from the beginning. It is an essential dimension and destiny of humanity; it is a part of life. Men and women are entrusted and charged with the development of creation; to bring it to a greater potentiality. "The command to be fruitful, to multiply, and to fill the earth immediately follows the word of blessing and involves a sharing of the divine creative capacities."¹⁸ It may be said that the Creator created a creation whose creatures are invited to participate in God's ongoing creative activity.

Fundamental to these biblical passages, as well as the entirety of the creation accounts, is relationship. "Upon that issue everything else hinges, including human *authority, power*, and the reality of *order* and *freedom* in human life."¹⁹ The well-being of the world depends on relationships: between God and creation, between God and creature, between creation and creature, and between creatures. God positively valued the world and it must be valued in the same way by those in whose care it was entrusted. Relationships are essential, not incidental, to work.

In reflecting on these passages, "covenantal" is a reasonable characterization of these relationships. "Covenant" refers to a formal or solemn alliance between two parties that mutually and unconditionally commit to each other. The Author of life is not authoritarian and not coercive. God spoke and it was so; God is to be trusted. Creation delights God and sustains His creatures. God generously and immediately delegates His authority over creation to humanity. He does not wait for humanity to prove worthy of it. Much has been given! Much is expected!

¹⁸ Fretheim, *The Book of Genesis*, 346.

¹⁹ Brueggemann, *Genesis, Interpretation*, 12.

Men and women are God's agents and have the responsibilities of a fiduciary. An agent is one who acts on behalf of another by attending to the interest of the other and not themselves. A fiduciary always acts with total trust, good faith, and honesty in every situation and circumstance. To work in the image and likeness of God is to honor the inherent goodness of the world and to work in relationship with the world and others. It is to work with the understanding that the tenure of the relationship is temporary. The world was inherited from those that came before and it is held in trust for those that are yet to come.

Humanity is called to subdue the earth and to exercise dominion over God's animals and creatures. The biblical notion of dominion does not have to do with exploitation, abuse, or grasping power. "It has to do with securing the well-being of every other creature and bringing the promise of each to full fruition."²⁰ It is custodial and administrative in nature. It is to cultivate and care for the garden that was meant to nourish and delight people.

When Called, "No" is not an Option (Exodus 3:9-15, 4:1-17)

So indeed the cry of the Israelites has reached me, and I have truly noted that the Egyptians are oppressing them. "Come, now! I will send you to Pharaoh to lead my people, the Israelites, out of Egypt." **But** Moses said to God, "**Who am I** that I should go to Pharaoh and lead the Israelites out of Egypt?" He answered, "I will be with you; and this shall be your proof that it is I who have sent you: when you bring my people out of Egypt, you will worship God on this very mountain." "**But,**" said Moses to God, "when I go to the Israelites and say to them, 'The God of your fathers has sent me to you,' if they ask me, 'What is his name?' what am I to tell them?" God replied, "I am who am." Then he added, "This is what you shall tell the Israelites: I AM sent me to you." God spoke further to Moses, "Thus shall you say to the Israelites: The LORD, the God of your fathers, the God of Abraham, the God of Isaac, the God of Jacob, has sent me to you. This is my name forever; this is my title for all generations."

²⁰ Brueggemann, *Genesis, Interpretation*, 32.

“But,” objected Moses, “suppose they will not believe me, nor listen to my plea? For they may say, ‘The LORD did not appear to you.’” The LORD therefore asked him, “What is that in your hand?” “A staff,” he answered. The LORD then said, “Throw it on the ground.” When he threw it on the ground it was changed into a serpent, and Moses shied away from it. “Now, put out your hand,” the LORD said to him, “and take hold of its tail.” So he put out his hand and laid hold of it, and it became a staff in his hand. “This will take place so that they may believe,” he continued, “that the LORD, the God of their fathers, the God of Abraham, the God of Isaac, the God of Jacob, did appear to you.” Again the LORD said to him, “Put your hand in your bosom.” He put it in his bosom, and when he withdrew it, to his surprise his hand was leprous, like snow. The LORD then said, “Now, put your hand back in your bosom.” Moses put his hand back in his bosom, and when he withdrew it, to his surprise it was again like the rest of his body. “If they will not believe you, nor heed the message of the first sign, they should believe the message of the second. And if they will not believe even these two signs, nor heed your plea, take some water from the river and pour it on the dry land. The water you take from the river will become blood on the dry land.” Moses, however, said to the LORD, “If you please, LORD, **I have never been** eloquent, neither in the past, nor recently, nor now that you have spoken to your servant; but I am slow of speech and tongue.” The LORD said to him, “Who gives one man speech and makes another deaf and dumb? Or who gives sight to one and makes another blind? Is it not I, the LORD? Go, then! It is I who will assist you in speaking and will teach you what you are to say.” Yet **he insisted**, “If you please Lord, send someone else!” Then the LORD became angry with Moses and said, “Have you not your brother, Aaron the Levite? I know that he is an eloquent speaker. Besides, he is now on his way to meet you. When he sees you, his heart will be glad. You are to speak to him, then, and put the words in his mouth. I will assist both you and him in speaking and will teach the two of you what you are to do. He shall speak to the people for you: he shall be your spokesman, and you shall be as God to him. Take this staff in your hand; with it you are to perform the signs.”

God’s call is focused, relentless, undeniable, and transformative. It takes away every excuse and breaks through determined resistance.

Moses, one of the world’s first great leaders, grows throughout the story of the Exodus. His education began in the Egyptian royal household, as the adopted son of Pharaoh’s daughter (also a leader within her own sphere of influence) and continued through the learning that comes of trials and errors and the lessons of trusted advisors.

His earliest lessons would have come from God who witnessed His people's affliction and heard their cry of complaint in Egypt. The LORD, in His own words, saw, listened, and then took an initiative on their behalf. It was a movement from empathy to compassion and then to action.

Motivated by compassion and passion, Moses too took action by slaying an Egyptian that struck a Hebrew worker when he had gone to visit his kin. Although he was raised in a royal household, he had not forgotten or turned his back on his people. He identified with the Hebrews. He is authentic.

In Midian, on the lam for having committed murder in Egypt, Moses' character is developed and revealed as having a bent for justice, mercy, and generosity, beginning with the defense of Reuel's daughters at a well and then watering their flock. Moses is a marked man. God draws him to Himself through the spectacle of a bush that burned but was not consumed. This pericope's extended litany of excuses and rebuttals offer a glimpse into the personality and character of Moses. He emerges as humble, authentic, and, perhaps, even fearful. He knows himself well and understands his shortcomings. "Moses offers five points of resistance concerning his awesome new vocation. Childs observes that each objection looks to a past reality, and each response of God moves Moses to a new future. The first resistance is that he is a genuine nobody: 'Who am I?... God's response to Moses is equally massive and characteristic: 'I will be with you.'"²¹

Moses steps into leadership within the model of a collaborative team (initially with Aaron and then other assistants as is told in the Book of Numbers) and in the style of a shepherd that guides, provides, and safeguards. He made it happen. He understood the

²¹ Walter Brueggemann, *The Book of Exodus: Introduction, Commentary, and Reflections*, The New Interpreter's Bible Series, Volume I (Nashville: Abingdon Press, 2002), 713.

mission and embraced it as his own and dedicated himself to its fulfillment even though he did not anticipate, or even desire, his own role in it.

Vision is Important
(Proverbs 29:18 from the King James Version (KJV))

Where there is no vision, the people perish.

The scriptural translations vary and the commentary written about this proverb is scanty. Many commentators have associated the “vision” of this proverb with prophecy. This tiny kernel, “vision,” however, is at the core of a leader. Vision is a product of imagination. It is the ability to conceptualize, hold, and carry mission to fruition. Without vision, the probability of success in any endeavor is limited. Confusion and dissipation sets in and movement in any direction is stalled. The situation is also prone to chaos.

Vision motivates leaders to inspire others to undertake the same mission. “Above all else...good leaders are visionaries. They see beyond what is to what might be, could be, and ought to be. They imagine possibilities and recognize potential. They are not afraid to let their imaginations soar and then make them a reality. But, more than that, they inspire others to dream along with them.”²² Vision is a complete understanding of where a group is going. Leaders clearly and persuasively state and restate direction, thus giving certainty and purpose to others.

To be able to inspire and influence others, a leader must understand people. To understand them is to lead from within. Leading from ‘within’ is to be with people and to

²² Charles E. Zech, *The Parish Management Handbook: A Practical Guide for Pastors, Administrators, and Other Parish Leaders* (Mystic, CT: Twenty-Third Publications, 2003), 116.

walk with them through their hopes and fears and their hopes and aspirations. “Good leaders are in touch, relentlessly in touch with the world’s joys and sufferings, and aware that in an interconnected world, one person’s decisions often affect the lives of many unseen others.”²³ Leadership from ‘within’ requires patience and compassion to be able to connect and form relationships with people. Leaders must also love the people that they lead.

Leaders are active. They are innovative, influential, and pioneering seekers of opportunity. Leadership takes responsibility and is energetic, ingenious, and generative. It is a life-giving activity. At its very best, excellent leadership produces more leaders.

Administration is a Spiritual Gift (1 Corinthians 12:27-31a)

Now you are Christ’s body, and individually parts of it. Some people God has designated in the church to be, first, apostles; second, prophets; third, teachers; then, mighty deeds; then gifts of healing, assistance, administration, and varieties of tongues. Are all apostles? Are all prophets? Are all teachers? Do all work mighty deeds? Do all have gifts of healing? Do all speak in tongues? Do all interpret? Strive eagerly for the greatest spiritual gifts.

Paul’s relationship with the church in Corinth was complicated and tumultuous. In a peppering of seven, tersely worded questions that point to a rather exasperated state of mind, St. Paul challenges his readers and listeners to overcome jealousy of others’ gifts and to strive, with earnestness and sincerity, for greater or higher gifts. In sum, to understand that the Christian’s priority is for a state of harmony even in the midst of diversity and animosity. Within the first list he curiously includes administration as a gift. Then it disappears as St. Paul lists the charisms again in a series of rhetorical

²³ Chris Lowney, *Pope Francis: Why He Leads the Way He Leads* (Chicago: Loyola Press, 2013), 59.

questions. The Church has benefited from the ministry of administration from her infancy and throughout her history.

Every call from God to undertake a vocation is equal in dignity because of its divine origin. Hierarchy in terms of sacred vocation or gift is impossible as God's plan is perfect. Gifts and talents are not distributed in the same way to each person and so their competencies must be identified and leveraged to the greater good. The charism of administration, therefore, may not be devalued or disdained.

Like grace, the Spirit works in lives in surprising ways, some of which bowls us over with their immediate power and obviousness while others may seem more like Elijah's 'gentle whisper' (1 Kings 19:12 NIV), more like silence than a whirlwind. Believers should never underestimate the power or mode of the Spirit's working even if to them the work is neither obvious nor overwhelming. Accordingly, in the shared life of faith even the action or deeds that seem the most menial and inconsequential may be the medium through which the Holy Spirit works to enrich the common good of the faithful.²⁴

The Greek word used by Paul that roughly translates as 'acts of administration,' literally translates as 'piloting.' "The figure of the helmsman is very popular for ruling."²⁵ Within the modern context, a pilot is one of the most important yet least known positions within the maritime industry. The pilot's job is to take all sizes and types of vessels through treacherous or congested waters where the smallest miscalculation could mean the loss of life, cargo, or ship or potential damage to the environment. Pilots board vessels and direct its navigation until it is safely berthed or out to sea. When out at sea, they usually board ships from pilot boats by climbing a ladder rigged over the side of a vessel, a dangerous operation in and of itself. We may speculate

²⁴ J. Paul Sampley, *The First Letter to the Corinthians: Introduction, Commentary, and Reflections*, The New Interpreter's Bible Series, Volume X (Nashville: Abingdon Press, 2002), 949-50.

²⁵ Hans Conzelman, *I Corinthians from the Hermeneia: A Critical and Historical Commentary on the Bible series*, George W. MacRae, SJ, ed. (Philadelphia: Fortress Press, 1975), 215.

that this type of work was similar, aside from the technology employed, in the times of the ancients.

Within an organization, the pilot's or helmsman's equivalent is the administrator. It is the work of governing or managing at different levels (chief executives, middle managers, and individual contributors) for the larger mission of the institution. It is the work of the execution of organizational vision and policy to the betterment of the whole.

As a vocation, "...the work of administration has as legitimate a claim on the Gospel and the Christian mission as does the more explicit and easily identified work of preaching or teaching or healing."²⁶ Vocations are invitations to movement and growth on personal, professional, and spiritual levels. "Calls impel us 'out' of ourselves to something more, something beyond."²⁷ They also impel us to pull others out of themselves. Ann Garrido notes that, "...administration, to put it in theological language, can be a 'praxis,' an activity with the potential to transform not only the lives of others, but oneself in the process."²⁸

We Have Differing Gifts (Romans 12:3-8)

For by the grace given to me I tell everyone among you not to think of himself more highly than one ought to think, but to think soberly, each according to the measure of faith that God has apportioned. For as in one body we have many parts, and all the parts do not have the same function, so we, though many, are one body in Christ and individually parts of one another. Since we have gifts that differ according to the grace given to us, let us exercise them: if prophecy, in proportion to faith; if ministry, in ministering; if one is a teacher, in teaching; if

²⁶ Senior, *The Gift of Administration*, xxvi.

²⁷ Garrido, *Redeeming Administration*, 8.

²⁸ Ann M. Garrido, "More Than a Desk Job: The spirituality of administration." *America: The National Catholic Review* (July 6, 2009), 1.

one exhorts, in exhortation; if one contributes, in generosity; if one is over others, with diligence; if one does acts of mercy, with cheerfulness.

The Church as “...one body in Christ” is endowed with extraordinary people that have differing gifts that are meant, when exercised in harmony, to further her mission. In this pericope from his letter to the Christians of Rome, Paul exhorts each member of the community to mature, sober-minded thinking as a way of developing self-understanding and an appreciation for the gifts that they have been graced with. It may be said that this is an exercise of discernment. Further, that these gifts, having not been earned or merited in any way, are to be accepted with gratitude and exercised wholeheartedly and responsibly for the purpose they were given, namely the betterment of the congregation. Implicit is the notion that one should not undertake a task for which one is not equipped.

Paul poetically presents, in a random sequence, a selection of seven gifts, a holy number, that include ministry or service and those that are over others or leadership per the translation of the New Revised Standard Version (NRSV) of the Bible. What Paul referenced as ministry or service likely was wide ranging and could have included, “...apostolic calling...fundraising...and meeting the daily needs of fellow believers...”²⁹ With respect to the gift of leadership, Paul avoided specific roles, such as “bishop” or “elder” and instead made a generic reference regarding a head of a group, such as those that have congregational responsibilities. “The expression probably implies appointment to a leadership role in an early house or tenement church, whether as presider, administrator of charitable work, or pastoral supervisor.”³⁰

²⁹ Robert Jewett, *Romans from the Hermeneia: A Critical and Historical Commentary on the Bible* series, Eldon Jay Epp, ed. (Minneapolis: Fortress Press, 2007), 748.

³⁰ Jewett, *Romans*, 753.

What resonate in this passage are the exhortations regarding how these charismatic gifts are to be exercised: “in ministering” with respect to ministry and “with diligence” when it comes to leadership. Essentially, not to disregard the gifts with which one is endowed. And further, to exercise them with passion and enthusiasm. “This criterion for the pursuance of administrative responsibilities would have had clear implications in the Roman setting, related to bureaucratic conscientiousness, efficiency, honest effort, goodwill, and vigor.”³¹ Passion for the work that one does will fuel learning, growth, and creativity.

To Lead is To Serve
(Luke 22:25-27)

He said to them, “The kings of the Gentiles lord it over them and those in authority over them are addressed as ‘Benefactors’; but among you it shall not be so. Rather, let the greatest among you be the youngest, and the leader as the servant. For who is greater: the one seated at table or the one who serves? Is it not he one seated at table? I am among you as the one who serves.”

The words, “I am among you as the one who serves,” reverberate throughout any writing or discussion on the topic of servant leadership. They are, and must be, at the core of who the Church’s leaders and administrators are and at the foundation of their decisions and actions. They do not lift themselves high; they lift others high. Authority authors life.

In St. Luke’s Gospel, Jesus spoke these words during his last supper with the apostles. He undoubtedly savored every last bittersweet moment with them and, filled with poignancy, he perhaps again sought to push them beyond themselves as they argued who amongst themselves was the greatest. And he sought not just to settle the debate, but

³¹ Jewett, *Romans*, 753.

also to convey the meaning of authority to those who would be called upon to take up his message and ministry in short order.

Time settled this argument of the apostles. It seemed as if not all of these apostles led in the manner of St. Peter or St. Paul. The historical record is scanty when it comes to many of them and some have receded into oblivion. Their influence, however, was and is unmistakable. This is the hallmark of leadership that is characterized by humble service and not motivated by personal ambition. To have influence on others, they would have to orient themselves to the other and not be turned in on themselves. Their legacy, Christianity, remains while the details of their personal lives have evaporated into the mists of time.

When it comes to what constitutes true power, “Pope Francis employs a rich concept: ‘Authentic power is service.’”³²

Patience, Compassion, and Forgiveness are Necessary Virtues (Or, How Not to Manage People)

The Parable of the Unforgiving Servant (Matthew 18:21-35 (NRSV))

Then Peter came and said to him, “Lord, if another member of the church sins against me, how often should I forgive? As many as seven times?” Jesus said to him, “Not seven times, but, seventy-seven times. For this reason the kingdom of heaven may be compared to a king who wished to settle accounts with his slaves. When he began the reckoning, one who owed him ten thousand talents was brought to him; and, as he could not pay, his lord ordered him to be sold, together with his wife and children and all his possessions, and payment to be made. So the slave fell on his knees before him, saying, ‘Have patience with me, and I will pay you everything.’ And out of pity for him, the lord of that slave released him and forgave him the debt. But that same slave, as he went out, came upon one of his fellow slaves who owed him a hundred denarii; and seizing him by the throat, he said, ‘Pay what you owe.’ Then his fellow slave fell down and pleaded with him, ‘Have patience with me, and I will pay you.’ But he refused; then he went and threw him into prison until he would pay the debt. When his fellow slaves saw what had happened, they were greatly distressed, and they went and reported

³² Lowney, *Pope Francis*, 41.

to their lord all that had taken place. Then the lord summoned him and said to him, ‘You wicked slave! I forgave you all that debt because you pleaded with me. Should you not have mercy on your fellow slave, as I had mercy on you?’ And in anger his lord handed him over to be tortured until he could pay his entire debt. So my heavenly Father will also do to every one of you, if you do not forgive your brother or sister from your heart.”

Jesus is a skilled storyteller and parables are a hallmark of his perceptive teaching. Parables invite their readers and listeners into engagement. They are multivalent and will have disparate meanings for different people. The same parable will convey varying impressions to the same person over time. To reduce a parable to a single or “best” meaning is to do violence to the text. “We might be better off thinking less about what they ‘mean’ and more about what they can ‘do’: remind, provoke, refine, confront, disturb...”³³ On the other hand, they do not have endless meanings. Students are advised to bear in mind an old adage pertaining to biblical studies, “Text without context is pretext.” Dr. Levine notes that once allegory enters into the mix of interpretation, the world and the concerns of the parable tend to be left behind.

Amy-Jill Levine observed that parables are meant to provoke and afflict. They may not be domesticated into pious platitudes. The parables echo the themes of Jesus’ teachings and debates and many are concerned with economics. “The parables, with their attention to wealth management, debts, daily wages, land ownership, and lost coins, speak to (these) same concerns.”³⁴ As a whole, the parables also sound the theme of relationships, including servant leadership.

³³ Amy-Jill Levine, *Short Stories by Jesus: The Enigmatic Parables of a Controversial Rabbi* (New York: HarperOne, 2014), 4.

³⁴ *Ibid.*, 11.

The characters and fantastic sums of money of the Parable of the Unforgiving Servant will be attended to by peeling away the simile, “kingdom of heaven” and St. Matthew’s allegorizations of life in the church. Although the person in the first movement of the parable is described as a slave, the better translation, given the sum of money involved, may be “servant” as is found in the NAB. The debt may have been incurred with the context of the world of high finance of the Ancient Near East: through the mismanagement of the king’s resources or the raising/collection of taxes from subject nations. Even so, the sum described in the passage by the NRSV is fantastic, even incomprehensible. “The annual tax income for all of Herod the Great’s territories was 900 talents per year. Ten thousand talents would exceed the taxes for all of Syria, Phoenicia, Judea, and Samaria.”³⁵ In short, the debt could not be paid back and the servant’s situation was hopeless.

When called to a reckoning by the king, the servant was ordered sold, along with his family and possessions. The servant fell down and paid the king homage, promising to pay and begged for a little more patience. Both knew that it was beyond the realm of possibility that this could ever be achieved, no matter the extension of time. Contrary to expectation, the king was moved to mercy and forgave the servant his debt in its totality. His action is expansive and may be taken to the dimension of infinitude. With the receipt of this unexpected and unprecedented good fortune, the servant’s reaction should have been euphoric. It should have been a transformative experience, one that should have led

³⁵ Boring, M. Eugene, “The Gospel of Matthew: Introduction, Commentary, and Reflections,” In *The Gospel of Matthew; The Gospel of Mark*. Vol. VIII of *The New Interpreter’s Bible: General Articles & Introduction, Commentary, & Reflections for Each Book of the Bible Including the Apocryphal/Deuterocanonical Books in Twelve Volumes*, ed. by Leander E. Keck, et al. (Nashville: Abingdon Press, 1995), 382.

to the development of an attitude of mercy. Perhaps he would have been motivated to pay forward this remarkable act of mercy.

In the next movement of the parable, a parallel of the first, the servant instead becomes an instigator of conflict rather than peace. Not even the tiniest hint of a sprout of the development of an attitude of mercy was exhibited by the first servant despite having been extended the unimaginable gift of the forgiveness of an incomprehensibly fantastic debt of 10,000 talents that quite literally could not be repaid. In an outrageous contrast of treatment, the first servant loses control of himself and violently insists on the payment of his debt from another servant. The debt being a tiny fraction of, and an infinite contrast to, what he himself had owed the king. He should have recognized the identity of the circumstances as the very same one that he had just left, but did not. “There is clearly no proportion between the violence of his assault and the smallness of the debt owed him, and this disproportion in turn completely reversed the relationship between the stratospheric sum he himself owed the king and the king’s superabundant dismissal of it.”³⁶

Their fellow servants are outraged by the first servant’s behavior and report it back to the king. The king revokes the forgiveness of the servant’s debt and condemns him to torment that is essentially eternal, for the full payment of a debt that could never have been repaid.

An entire litany of shortcomings may be ascribed to the first servant. The short list would include a lack of humility, self-awareness, and self-control (emotional intelligence). He was certainly not a practitioner of mercy. “...Mercy is never realized

³⁶ Erasmo Leiva-Merikakis, *Fire of Mercy, Heart of the Word: Meditations on the Gospel According to St. Matthew, Volume Two (Chapters 12-18)* (San Francisco: Ignatius Press, 2003), 651.

in the abstract but only through a concrete exercise of forgiveness.”³⁷ All of these are essential characteristics of leaders. Given the context of the parable, it was possible that the hard-hearted servant held a position of authority although he himself was no leader. Leaders are not born as such. Leadership is learned over time through examples, communities of people, and situations. The lessons learned of mistakes, while particularly painful and memorable, are transformative. The first servant did not allow a graced moment to transform him.

It's Important to Be Generous and to Honor Commitments with Grace
The Parable of the Laborers in the Vineyard (Matthew 20:1-16)

“The kingdom of heaven is like a landlord who went out at dawn to hire laborers for his vineyard. After agreeing with them for the usual daily wage, he sent them into his vineyard. Going out about nine o’clock, he saw others standing idle in the marketplace, and he said to them, ‘You too go into my vineyard, and I will give you what is just.’ So they went off. (And) he went out again around noon, and around three o’clock, and did likewise. Going out about five o’clock, he found others standing around, and said to them, ‘Why do you stand here idle all day?’ They answered, ‘Because no one has hired us.’ He said to them, ‘You too go into my vineyard.’ When it was evening the owner of the vineyard said to his foreman, ‘Summon the laborers and give them their pay, beginning with the last and ending with the first.’ When those who had started about five o’clock came, each received the usual daily wage. So when the first came, they thought that they would receive more, but each of them got the usual wage. And on receiving it they grumbled against the landowner, saying, ‘These last ones worked only one hour, and you have made them equal to us, who bore the day’s burden and the heat.’ He said to one of them in reply, ‘My friend, I am not cheating you. Did you not agree with me for the usual daily wage? Take what is yours and go. What if I wish to give this last one the same as you? (Or) am I not free to do as I wish with my own money? Are you envious because I am generous? Thus, the last will be first, and first will be last.’”

Common interpretations of this parable have a soteriological focus. Many exegetes would agree that the parable has to do with God’s graciousness and human relationships. From this perspective, the parable is safe, comforting and reassuring. But

³⁷ Leiva-Merikakis, *Fire of Mercy Volume Two*, 654.

it loses its challenge. If, as Dr. Amy-Jill Levine exhorts, the reader or listener is attentive to how the parable is provocative, then one will consider the earthly issue of who gets a day's wage rather than who gets to heaven.

The landowner and laborers need each other. But to what extent? As the holder of the means of economic production, including vineyard, crops, and wages, the landowner has the upper hand. In short, the laborers need the landowner more than he needs them. At the harvest, however, the landowner would be short of the labor he needs to bring in crops and the income that they generate. The tables would have turned, but just slightly.

As the parable begins to unfold, nothing about its topic or its characters is unusual. Additionally, none of the characterizations are nefarious. All in the parable is as it typically is for a vineyard at harvest time.

Then the reader or hearer is offered the spectacle of the landowner traveling back and forth between the marketplace, seeking workers for his vineyard. The landowner. Not his manager. Not once, but at least five times and at different times of the day. This is unusual in that landowners, as well as their managers, know from prior experience how much labor they need. The real reason may be other than being clueless about his needs for labor or that he has insufficient workers.

None of the people standing in the marketplace, who were without work, declined the landowner's job offers. He may have had the reputation for being fair and not a tyrant or an exploiter. All went to work and none among them seemed to distinguish themselves as lazy or shiftless. At the end of the day all of the workers, including those hired late in the day, were paid the same wage, much to the chagrin of those that worked

the greater part of the day. “The laborers should have been happy about the good fortune of their coworkers who, because of the generosity of the landowner, would now have enough provision for their families.”³⁸ Instead, they grumbled against the landowner because of his generosity.

The landowner is magnificent in his management of the disappointed workers. He defuses the tension, by seeking to change their hearts. He addresses one personally as, “my friend,” and asks him to recall their agreement for the usual daily wage. He is not angry and does not chastise him but instead challenges him to open his heart to the needs of his coworkers and the generosity of the landowner. The disgruntled worker is not shortchanged; he is paid the agreed upon wage.

The lessons are rich for both employers and workers. First, that fairness is not as important as that people get enough rather than get more when they already have enough. Second, that employers support laborers to the extent of hiring beyond the scope of minimal need. Finally, that there is relationship to be had in the place of work: first, between employer and worker and second, between workers. These relationships, in particular, are opportunities for community, self-discovery, and growth. They enhance the work of the organization as a whole; the work of the common good. “In the end, all have enough to eat, and the rich recognize their responsibility to those who are less well off, a responsibility that includes not simply giving a handout, but hiring ‘workers’ who can thus preserve their dignity.”³⁹

³⁸ Levine, *Short Stories by Jesus*, 215.

³⁹ Ibid., 219.

**All Manner of Nasty Things Roll Downhill
On Integrity (Luke 6:43-45)**

“A good tree does not bear rotten fruit, nor does a rotten tree bear good fruit. For every tree is known by its own fruit. For people do not pick figs from thornbushes, nor do they gather grapes from brambles. A good person out of the store of goodness in his heart produces good, but an evil person out of a store of evil produces evil; for from the fullness of the heart the mouth speaks.”

These verses emphatically articulate the conviction that character precedes action.

“A person’s deeds therefore revealed the state of the ‘heart.’”⁴⁰ It is the depth of character that carries people to any sort of finish line. The development of character occurs in the maelstrom of life. When it comes to meeting these challenges, Chris Lowney quotes Helen Keller who argued, “Character cannot be developed in ease and quiet. Only through experience of trial and suffering can the soul be strengthened, ambition inspired, and success achieved.”⁴¹ Those that persist and persevere in the practice of the virtues of courage, integrity, and respect have mastered themselves and they, in turn, lead others with character. Trust is earned through virtuous behavior.

**Learn from Mistakes and Move Forward with Practicality and Prudence
The Parable of the Dishonest Steward (Luke 16:1-8, 10)**

Then he also said to his disciples, “A rich man had a steward who was reported to him for squandering his property. He summoned him and said, ‘What is this I hear about you? Prepare a full account of your stewardship, because you can no longer be my steward.’ The steward said to himself, ‘What shall I do, now that my master is taking the position of steward away from me? I am not strong enough to dig and I am ashamed to beg. I know what I shall do so that, when I am removed from the stewardship, they may welcome me into their homes.’ He called in his master’s debtors one by one. To the first he said, ‘How much do you owe my master?’ He replied, ‘One hundred measures of olive oil.’ He said to him, ‘Here is your promissory note. Sit down and quickly write one for fifty.’ Then to another he said, ‘And you, how much do you owe?’ He replied, ‘One

⁴⁰ Luke Timothy Johnson, *The Gospel of Luke*, vol. 3 of *Sacra Pagina Series*, ed. Daniel J. Harrington, SJ (Collegeville, MN: The Liturgical Press, 1991), 114.

⁴¹ Lowney, *Pope Francis*, 31.

hundred kors of wheat.’ He said to him, ‘Here is your promissory note; write one for eighty.’ And the master commended that dishonest steward for acting prudently.

The person who is trustworthy in very small matters is also trustworthy in great ones; and the person who is dishonest in very small matters is also dishonest in great ones.”

Commentaries vary in their interpretation of this parabolic narrative that Jesus directed only to his disciples. Did the steward repent? Or did he continue to insolently broker deals that squandered the rich man’s property? If he again indulged in fiscal mismanagement, then why did the master commend him for acting prudently rather than taking further action against him? Was he being sarcastic? Perhaps it is a story of growth.

This reflection will take the path of the steward’s movement toward repentance and conversion. The accusation of mismanagement led to a crisis and the need for decisions. In the process of preparing for the accounting that was demanded by his master, the steward took an inventory of his skills, considered his options, took action, and, in the end, gained his master’s commendation for his shrewdness. It may not be an unreasonable hermeneutical stretch and certainly within the realm of practicality to say that the steward understood that this disgrace would neither endear him to others nor promote him for employment within the community. He had foresight. “Continuing to have a welcome is equivalent to preserving one’s dignity, not losing one’s social status, maintaining a sense to one’s life, getting off easy after an emotional struggle.”⁴² He needed to move quickly and decisively to secure a future for himself knowing that he did

⁴² Francois Bovon, *Luke 2: A Commentary on the Gospel of Luke 9:51-19:27, Hermeneia-A Critical and Historical Commentary on the Bible*, ed. by Helmut Koester and transl. by Donald S. Deer (Minneapolis: Fortress Press, 2013), 448.

not have the physical stamina for manual labor and was too ashamed to beg for his living. The steward sought to benefit from the remaining fine margin of maneuverability remaining to him by calling in his master's debtors to change their terms of payment by reducing the amounts that they owed. The quantities indicated in the parable make it likely that commercial interests were at stake and not that of households. Perhaps the quantities owed by the debtors had accumulated over time. His intention may have been to clear his name, as best he could, or to acquire a personal debt of honor and gratitude from the debtors that they would be bound to reciprocate. Perhaps both. "The chief difficulty in interpreting the parable concerns the steward's action in reducing the debts."⁴³ Given his earlier analysis of how his future may play out, the lowered terms of payment may have been the result of a discount or abatement of the steward's own customary cut and not a reduction of the principle amount. "It was not uncommon for managers, like tax collectors, to be able to add a large margin for profit to what had to be repaid to the owner who made loans."⁴⁴ Alternatively, the steward may have reduced the amount of interest levied by his master. Perhaps both. Actions such as these would thereby earn his master's qualified commendation of prudence that could then carry him into a future employment prospect. If the steward discounted both the master's interest on the amount owed and the steward's fee, then both the master and the steward would be cast in a favorable light and be holders of debts of gratitude.

⁴³ R. Alan Culpepper, "The Gospel of Luke: Introduction, Commentary and Reflections," In *The Gospel of Luke; The Gospel of John*. Vol. IX of *The New Interpreter's Bible: General Articles & Introduction, Commentary, & Reflections for Each Book of the Bible Including the Apocryphal/Deuterocanonical Books in Twelve Volumes*, ed. by Leander E. Keck, et al. (Nashville: Abingdon Press, 1995), 308.

⁴⁴ Bovon, *Luke 2*, 448.

The steward was put into a position of authority but was no leader. Further, he apparently had no leadership of self, given his penchant for being free with assets that were not his own. He was a latecomer to the notion of integrity as virtue; failure, pointed out by another, became his learning laboratory. No matter, the skill set necessary for leadership is not gifted at birth but acquired over time. “Leadership is not a gift with which we are endowed at birth. It is something we acquire in the course of time, often after many setbacks, failures.”⁴⁵ Although he fell, he kept on going and, in the end, his actions are to be commended from the perspectives of leadership and administration. “It is not their victories that make people leaders; it is the way they cope with their defeats—their ability to learn, to recover, and to grow.”⁴⁶ Mistakes are the occupational hazards of leadership. By taking responsibility, this parable tells the story of the steward’s growth in the midst of the messiness of human life.

On Leadership (Trust) and Being Led (Trustworthiness) The Parable of the Talents (Mt 25:14-30)

“It will be as when a man who was going on a journey called in his servants and entrusted his possessions to them. To one he gave five talents; to another, two; to a third, one – to each according to his ability. Then he went away. Immediately the one who received five talents went and traded with them, and made another five. Likewise, the one who received two made another two. But the man who received one went off and dug a hole in the ground and buried his master’s money. After a long time the master of those servants came back and settled accounts with them. The one who had received five talents came forward bringing the additional five. He said, ‘Master, you gave me five talents. See, I have made five more.’ His master said to him, ‘Well done, my good and faithful servant. Since you were faithful in small matters, I will give you great responsibilities. Come, share your master’s joy.’ (Then) the one who had received two talents also came forward and said, ‘Master, you gave me two talents. See, I have made two more.’ His master said to him, ‘Well done, my

⁴⁵ Rabbi Jonathon Sacks, *Lessons in Leadership: A Weekly Reading of the Jewish Bible* (New Milford, CT: Maggid Books & The Orthodox Union, 2015), xxi.

⁴⁶ *Ibid.*, 54.

good and faithful servant. Since you were faithful in small matters, I will give you great responsibilities. Come, share your master's joy.' Then the one who had received the one talent came forward and said, 'Master, I knew you were a demanding person, harvesting where you did not plant and gathering where you did not scatter; so out of fear I went off and buried your talent in the ground. Here it is back.' His master said to him in reply, 'You wicked, lazy servant! So you knew that I harvest where I did not plant and gather where I did not scatter? Should you not then have put my money in the bank so that I could have got it back with interest on my return? Now then! Take the talent from him and give it to the one with ten. For to everyone who has, more will be given and he will grow rich; but from the one who has not, even what he has will be taken away. And throw this useless servant into the darkness outside, where there will be wailing and grinding of teeth.'"

Parables should afflict the comfortable and comfort the afflicted; they mean to provoke, remind, confront, and disturb. And so it is with the Parable of the Talents. While it lifts minds to the eschatological, its nuances teach of the day-to-day matters of leading and being led.

The master's character and style of leadership may be teased out of this parable directly and by way of inference. He is observant, trusting, empowering, and just. He also sets a good example for his servants to follow.

Several profitable lessons may be gleaned by using the word, 'talent,' with the meaning of a gift that is bestowed upon a person. But the 'talent' referenced in this parable was an ancient unit of mass and used as a monetary measure. No precise conversion exists that translates a talent to a modern equivalent. Some have described it as fifteen years' of wages of an ordinary worker. A "talent" has been estimated to be valued in the range of \$300,000 to \$660,000 in today's dollars. In short, it was a ridiculously, laughably huge amount of money to entrust to a servant (NAB) or a slave (NRSV).

The master knows his servants and understands each one's ability. "...In each case the act of entrustment is wholly in keeping with the master's intimate knowledge of each servant's person and abilities."⁴⁷ Because of his keen observations and experiences with them, he is confidently able to calibrate each servant's responsibility according to the abilities of each.

Ability or capacity is the power to accomplish. Each person, in this case, the servants, has limited or unique capacity. That capacity is real and ready to be activated. In fact, it is the dynamic presence of the Bestower of gifts. Grace heightens and enhances the potential of ability or capacity. In this parable, the master seeks to unlock the potential of his servants by delegating responsibility.

The master is trusting. "...The degree of trust the master unquestioningly exhibits towards his servants (is striking)."⁴⁸ It may be said that the master's unqualified trust is almost naïve, considering the magnitude of wealth that he handed to the servants for safekeeping.

By leaving for his journey, the servants are empowered to enter into the master's role and work. They are entrusted to act in the master's place and take his interests to heart: to protect his goods, to invest, and to make gains with the talents that he left to each. They are called to ascend to the master's horizon that is of a broad, all-encompassing vision. They are to see with the eyes of the master. Counter-intuitively, the master allows for the growth and transformation of his servants by withdrawing and allowing each to his own devices and creativity.

⁴⁷ Erasmo Leiva-Merikakis, *Fire of Mercy, Heart of the Word: Meditations on the Gospel According to Saint Matthew, Volume Three (Chapters 19-25)* (San Francisco: Ignatius Press, 2012), 821.

⁴⁸ *Ibid.*, 801.

Upon his return, the master rightfully seeks an accounting of what each servant accomplished in his absence. He will look for a return that is proportional to what was given according to each one's ability. The master reviewed and evaluated outcomes with justice and the servants were rewarded accordingly.

The servants are called to embody the master in his absence and work with integrity, diligence, and fidelity. For the first two servants, a proportional distribution of the talents did not matter; they were not jealous. They both committed themselves to their assignment in anticipation of their master's return. In the end, the one entrusted with two talents was praised and rewarded, word for word, in precisely the same way as the one who had been given five. Further, the one who was initially given five talents was given a bonus of an additional talent in the end. Quite plainly and sensibly, the parable conveys that the successful handling of lesser responsibility will merit greater responsibility.

The master's reward transitions from the tangible to the intangible, from objective to the subjective, from this world to the heavenly, from time to the timeless. He calls the first two servants to enter into the joy of the master. Really, it is a new dimension of existence that is divinization. "Not only are 'joy' and 'responsibility' not incompatible; they actually seem to require one another."⁴⁹ All the joys and concerns of the master's heart become the servants'. The reward for their accomplishment is generous and just.

The third servant takes an approach far different than that of the first two. Leiva-Merikakis holds that the more faithful translation of the Greek renders the characterization of the third servant as being fearful rather than being lazy. He indicates

⁴⁹ Leiva-Merikakis, *Fire of Mercy Volume Three*, 815.

that, “His need to feel safe supersedes all loyalty to the master’s interests and cripples his better judgment.”⁵⁰

At first blush his action, to bury the treasure, appears reasonable, although conservative. In that time, people buried money to guard against theft. The best clues to this servant’s ability, motivation, and attitude, however, are to be gleaned from the master’s actions toward him before he left and after he arrives home. To wit, the master was confident of his ability and reliability because he left a substantial treasure in his safekeeping. It may be said that the third servant, however, did not trust. He did not trust the master’s confidence in him in spite of palpable evidence to the contrary. His deliberate choice to turn in on himself and embrace fear and suspicion disables him. For him, fear becomes a destructive idol that becomes a spiritual snare, suffocating him and leading to professional suicide. He may have chosen to disregard the examples set by the first two servants and perhaps the opportunity to collaborate. “The reasonable person, conscious of his limitations and sensitive to outstanding examples, allows himself to be persuaded by the behavior of others when it obviously exhibits promising traits.”⁵¹ Fear overcomes reason.

The servant’s attitude betrays itself when the master seeks his accounting of the talent that he entrusted to him. He is scornful, insolent, and impudent. The first two say to the master, “you gave me...” The third servant begins by saying, “I know you...” and betrays the bias that caused his immobility. It hearkens to the temptation in the Garden of Eden, to be like gods. The third servant’s characterization of the master as demanding

⁵⁰ Leiva-Merikakis, *Fire of Mercy Volume Three*, 809.

⁵¹ *Ibid.*, 819.

(or perhaps translatable as strict, harsh, or cruel) and his fear of him are unfounded, given the behavior of the first two. Does he accuse him of being an opportunist or, worse, a thief, by flinging at him that he harvests where he did not sow and reaps where he did not scatter seed? The irony is rich in light of what the first two servants accomplished. The master wonders why he did not bank the money to at least earn interest. Apparently, even minimal attainment would have been better than immobility and apathy. These statements imply that he took the most expedient route to ensure the safety of the money and then took the opportunity to take an extended time away from his primary responsibility. The master condemns the refusal to move and to grow as wicked and lazy.

Summary

This selection of scriptural passages indicate, either directly or indirectly, that administration and leadership are charisms. As such, the call to this work has a divine origin and is not to be denied. Each person was brought into being to do a holy work that no other person ever has or ever will do. When exercised faithfully by those that possess the charism, administration is life-giving to the enterprise and to those that participate or have a stake in its activity. Our places of work and ministry, whether they are churches, companies, organizations, or homes, should be places of formation and transformation. Leaders and administrators are to give life and meaning to God's people: colleagues, employees, management, vendors, and customers. They must be attentive to the "other."

Theoretical Framework: The Mind of the Church Today

The Documents of the Second Vatican Council All are Called to Holiness and All Share in Mission

It was on October 28, 1958, after 11 ballots, that the 76-year old Angelo Roncalli was called to the ministry of the papacy, following the extended, 20-year pontificate of Pius XII. He was the twenty-third to take the name, John. Among his reasons for taking it was that it was the name of a long line of popes whose pontificates were short. His personal background was humble and his ecclesiastical resume was modest. He was known for his self-deprecating sense of humor. The stories have it that during his papacy he visited the Hospital of the Holy Spirit in Rome and the sister that ran the hospital introduced herself as the Superior of the Holy Spirit. He answered that she was very lucky to hold the position as he himself was only the Vicar of Christ. He was supposed to be a “caretaker pope.” It was supposed to be a “papacy in abeyance.” Neither of these were the case.

Ninety days into his papacy, on January 29, 1959, he called for an ecumenical council because, he said, the Church needed *aggiornamento*. It was a monumental undertaking and would be the biggest meeting in the history of the world. The Second Vatican Council was the first truly global ecumenical council and was attended by over 2,500 bishops, 500 theologians, 80 Orthodox, Protestant and Jewish observers, and 52 lay auditors from all over the world. It was the first council to be attended by women, reporters, and journalists. And it was the Catholic Church’s seminal event of the 20th century.

So the windows were thrown open to the breath of the Spirit and the Council proceeded to principally devote itself to the study of the Church and her relationship with the world. Vatican II generated 16 documents between 1963 and 1965. It was the most prolific of any council in the history of the Church. “The twenty-one ecumenical councils together produced 37,727 lines of text. Of those some 37,000 lines, Vatican II alone produced 12,179 (approx. 32 percent)...”⁵² The core, or highest ranking, documents are the four constitutions and provide the orientation according to which the nine decrees and three declarations are to be interpreted. Together, they center on the call to holiness. Together, they are a most solemn exercise of magisterium. Pope Paul VI exhorted, “...that all that has been established synodally is to be religiously observed by all the faithful, for the glory of God and the dignity of the Church and for the tranquillity (*sic*) and peace of all men.”⁵³

The rhetorical style of the documents alone pointed to a changed attitude and a fresh orientation for the Church. The language used was a striking and a dramatic departure from that of prior councils’. It was positive, pastoral, and inviting. The words were humble, reciprocal, and interior. Condemnations and denunciations, which accessorized prior council documents, were entirely and notably absent. Overall, the tone was appropriate for spiritual renewal. In his words to those gathered for the last general meeting of Vatican II, on December 7, 1965, Pope Paul VI said of the Council’s language,

⁵² Richard R. Gaillardetz and Catherine E. Clifford, *Keys to the Council: Unlocking the Teaching of Vatican II*, (Collegeville, MN: Liturgical Press, 2012), xiv.

⁵³ Paul VI, Apostolic Brief of Pope Paul VI “*In Spiritu Sancto*,” for the Closing of the Council, December 8, 1965, The Holy See, http://w2.vatican.va/content/paul-vi/en/apost_letters/documents/hf_p-vi_apl_19651208_in-spiritu-sancto.html (accessed February 7, 2017), last paragraph.

...It has spoken with the accommodating friendly voice of pastoral charity; its desire has been to be heard and understood by everyone; it has not merely concentrated on intellectual understanding but has also sought to express itself in simple, up-to-date, conversational style, derived from actual experience and a cordial approach which make it more vital, attractive and persuasive; it has spoken to modern man as he is. Another point we must stress is this: all this rich teaching is channeled in one direction, the service of mankind, of every condition, in every weakness and need. The Church has, so to say, declared herself the servant of humanity, at the very time when her teaching role and her pastoral government have, by reason of the council's solemnity, assumed greater splendor and vigor: the idea of service has been central.⁵⁴

Vatican II shifted the Church and reoriented her self-understanding and place in the world. By virtue of baptism, all are called to participate and share in the divine life. All are called to holiness. All share in mission. "Thus by Baptism men and women are implanted in the paschal mystery of Christ; they die with him, are buried with him, and rise with him..."⁵⁵

With an inward perspective, the dogmatic constitution, *Lumen Gentium*, expressed the mission and nature of the Church in its opening lines. That is, to continue the work that Jesus began in order to bring to all of humanity the light of Christ who revealed the mystery of God. It advanced and put first the concept of the "People of God" before its discussion of the hierarchy and laity. "The symbolism of the change was potent: the first reality of the church is horizontal and consists of all the baptized, without distinction of rank. Only then comes the vertical reality."⁵⁶ It dismantled a

⁵⁴ Paul VI, Address of Pope Paul VI During the Last General Meeting of the Second Vatican Council, 7 December 1965, The Holy See, https://w2.vatican.va/content/paul-vi/en/speeches/1965/documents/hf_p-vi_spe_19651207_epilogo-concilio.html (accessed October 1, 2016), 4.

⁵⁵ Vatican Council II, "*Sacrosanctum Concilium*," in *Vatican Council II: The Basic Sixteen Documents*, ed. Austin Flannery (Northport, NY: Costello Publishing Company, 2007), sec. 6.

⁵⁶ John W. O'Malley, *What Happened at Vatican II* (Cambridge, MA: The Belknap Press of Harvard University Press, 2008), 178.

prevailing attitude regarding classes of Christian and degrees of holiness by proclaiming that the Christian call to holiness is universal, regardless of one's state in life. Even though they differ, the common priesthood of the faithful and the ministerial priesthood are interrelated; they both, in their unique way, share in the one priesthood of Christ. Finally, the constitution is imbued with the theology of the Holy Spirit. It favored a vision that, "...saw the Spirit building up the church in service of its mission through baptismal charisms, the unique contributions of consecrated religious life, and ordained ministries."⁵⁷

The Council recovered an ancient theology of the priesthood of the baptized, a state of "being" and not "doing." The baptized, both men and women, are impelled to bring their faith to bear on their day to day lives through words and deeds. Their relationship is to the marketplace. *Lumen Gentium*, established the essential role of the laity in the life of the Church using the themes of mutuality, collaboration and cooperation. Essentially, to be as Christ, a light to the nations, as illustrated by the following selection of excerpts:

- The Holy Spirit, ...also distributes special graces among the faithful of every rank. By these gifts, he makes them fit and ready to undertake various tasks and offices for the renewal and building up of the church.⁵⁸
- The term laity is here understood to mean all the faithful...who by Baptism are incorporated into Christ, are constituted the people of God, who have been made sharers in their own way in the priestly, prophetic and kingly office of Christ and play their part in carrying out the mission of the whole Christian people in the church and in the world.⁵⁹

⁵⁷ Gaillardetz and Clifford, *Keys to the Council*, 65.

⁵⁸ Vatican Council II, "*Lumen Gentium*," in *Vatican Council II: The Basic Sixteen Documents*, ed. Austin Flannery (Northport, NY: Costello Publishing Company, 2007), sec. 12.

⁵⁹ *Ibid.*, sec. 31.

- It is the special vocation of the laity to seek the kingdom of God by engaging in temporal affairs and directing them according to God's will.⁶⁰
- The apostolate of the laity is the sharing in the church's saving mission. Through Baptism and Confirmation all are appointed to this apostolate by the Lord himself.⁶¹
- The laity, however, are given this special vocation: to make the church present and fruitful in those places and circumstances where it is only through them that it can become the salt of the earth.⁶²
- Besides this apostolate which belongs to absolutely every Christian, the laity can be called in different ways to more immediate cooperation in the apostolate of the hierarchy, like those men and women who helped the apostle Paul in the Gospel, working hard in the Lord (see Phil 4-3; Rom 16:3 ff.). They may, moreover, be appointed by the hierarchy to certain ecclesiastical offices which have a spiritual aim.⁶³
- All laity, then, have the exalted duty of working for the ever greater extension of the divine plan of salvation to all people of every time and every place.⁶⁴
- Therefore, even when occupied with temporal affairs, the laity can and must be involved in the precious work of evangelizing the world.⁶⁵
- Therefore, by their competence in secular disciplines and by their activity which grace elevates from within, let them do all in their power to ensure that through human labor, technical skill and civil culture the goods of creation may be developed for the benefit of everyone without exception, according to the plan of the creator and the light of his word, that these goods may be more equitably distributed among all men and women and may make their own contribution to universal progress in human and Christian liberty.⁶⁶
- To the extent of their knowledge, competence or authority the laity are entitled, and indeed sometimes duty-bound, to express their opinions on matters which concern the good of the church.⁶⁷

⁶⁰ Vatican Council II, "*Lumen Gentium*," sec. 31.

⁶¹ *Ibid.*, sec. 33.

⁶² *Ibid.*

⁶³ *Ibid.*

⁶⁴ *Ibid.*

⁶⁵ *Ibid.*, sec. 35.

⁶⁶ *Ibid.*, sec. 36.

⁶⁷ *Ibid.*, sec. 37.

- The sacred pastors, however, should recognize and promote the dignity and responsibility of the laity in the church.⁶⁸
- Many benefits for the church are to be expected from this familiar relationship between the laity and the pastors. The laity's sense of their own responsibility is strengthened, their zeal is encouraged, they are more ready to add their strengths to the work of their pastors. The pastors, helped by the experience of the laity, are enabled to judge more clearly and more appropriately in spiritual and in temporal matters. Strengthened by all its members, the church can thus more effectively fulfill its mission for the life of the world.⁶⁹
- Then there are those lay persons chosen by God who are called by the bishop to give themselves to apostolic works and who labour (*sic*) very fruitfully in the Lord's field.⁷⁰

The remarkable words of *Lumen Gentium* elevated the role of the laity in the life of the Church and in the world. Women and men are called to participation and engagement and not to servile obedience to clerics. Even more remarkable, the decree *Christus Dominus*, calls for lay participation at the level of the Roman Curia. "Finally, the Fathers of the council judge that it would be most advantageous if these departments were to have more frequent recourse to the advice of lay people distinguished for virtue, knowledge and experience so that they also may have an appropriate role in the affairs of the church."⁷¹

The vision of *Lumen Gentium* was also repeated in *Apostolicam Actuositatem*. The century old prophetic witness of Blessed John Henry Newman is echoed in the decree. The Cardinal famously noted in his *On Consulting the Faithful on Matters of*

⁶⁸ Vatican Council II, "*Lumen Gentium*," sec. 37.

⁶⁹ Ibid.

⁷⁰ Ibid., sec. 41.

⁷¹ Vatican Council II, "*Christus Dominus*," in *Vatican Council II: The Basic Sixteen Documents*, ed. Austin Flannery (Northport, NY: Costello Publishing Company, 2007), sec. 10.

Doctrine that the Church would look foolish without the laity. The decree also indicates that charisms endowed by the Holy Spirit are foundational of the lay apostolate. From *Apostolicam Actuositatem* are the following extracts:

- Indeed, the church can never be without the lay apostolate; it is something that derives from the lay person's very vocation as a Christian.⁷²
- ...The Church can only with difficulty make its presence and action felt without the help of the laity.⁷³
- Lay people too, sharing in the priestly, prophetic and kingly office of Christ, play their part in the mission of the whole people of God in the church and in the world.⁷⁴
- Lay people's right and duty to be apostles derives from their union with Christ their head. Inserted as they are in the mystical body of Christ by baptism and strengthened by the power of the Holy Spirit in confirmation, it is by the Lord himself that they are assigned to the apostolate.⁷⁵
- From the reception of these charisms, even the most ordinary ones, there follow for all Christian believers the right and duty to use them in the church and in the world for the good of humanity and the development of the church, to use them in the freedom of the Holy Spirit who 'chooses where to blow' (Jn 3:8), and at the same time in communion with the sisters and brothers in Christ, and with the pastors especially.⁷⁶
- The laity, carrying out this mission of the church, exercise their apostolate therefore in the world as well as in the church, in the temporal order as well as in the spiritual.⁷⁷

The documents of the Second Vatican Council have put out the call to all of the baptized to exercise the charisms that they have been endowed with for the good of the

⁷² Vatican Council II, "*Apostolicam Actuositatem*," in *Vatican Council II: The Basic Sixteen Documents*, ed. Austin Flannery (Northport, NY: Costello Publishing Company, 2007), sec. 1.

⁷³ Ibid.

⁷⁴ Ibid., sec. 2.

⁷⁵ Ibid., sec. 3.

⁷⁶ Ibid.

⁷⁷ Ibid., sec. 5.

world and the Church; to effect transformation within the world and not to be set apart from it. A number of the Council's texts use the metaphor of "leaven" in describing the role of the church and the laity in the world. Most commonly used in the context of baking bread, leaven (yeast), when mixed with flour and water, produces fermentation. The result, bread, is a basic food that is essential to human life.

Pope Paul VI, in his Apostolic Brief, "*In Spiritu Sanctu*," noted that the Second Vatican Council will undoubtedly be numbered among the greatest events in the history of the Church. It was largest in the number of those in attendance, including those bishops whose sees were newly established. It was the richest for the careful scrutiny and consideration given to the questions posed to the Council. It was opportune because it not only sought to meet the pastoral needs of the present day Church, but also to the Christians separated from the Church and then beyond to the whole human family.

By virtue of baptism, all are called to share in the mission of the Church. Jesus spent the majority of his life in the practice of a trade and not teaching and ministry. All are exhorted to bring to bear their Christian beliefs on their secular work. Conversely, all are invited to share their gifts, talents, and skills with the Church. The Church is to unconditionally welcome each person's unique presence and charisms in the knowledge that they reflect the image and likeness of God. And, further, to boldly invite those with particular skills, such as leadership and administration, into the service of the Church.

The Code of Canon Law The Church's Administrative Requirements

The Code of Canon Law, the ecclesiastical laws governing the Catholic Church, echoes the words of the documents of the Second Vatican Council. Per §1 of Canon 204, the Christian faithful, by virtue of baptism, have been made sharers in Christ's priestly,

prophetic, and royal function and are called to exercise the mission that God entrusted to the Church. Further, that there is, "...A true equality regarding dignity and action by which they (the Christian faithful) all cooperate in the building up of the Body of Christ according to each one's own condition and function."⁷⁸

The Canon recognizes that, in terms of administration, the laity are a gift to the Church in terms of talent and service. "Lay persons who excel in necessary knowledge, prudence, and integrity are qualified to assist the pastors of the Church as experts and advisors, even in councils according to the norm of law."⁷⁹ They are exhorted in Canon 231 to acquire formation or training to better carry out their obligations and to do so with a positive attitude: conscientiously, diligently, and eagerly. They are also called upon to voice their opinions. "According to the knowledge, competence, and prestige which they possess, they have the right and even at times the duty to manifest to the sacred pastors their opinion on matters which pertain to the good of the Church and to make their opinion known to the rest of the Christian faithful, without prejudice to the integrity of faith and morals, with reverence toward their pastors, and attentive to common advantage and the dignity of persons."⁸⁰

The Canon addresses the care of the Church's property in very particular ways that require the attention of her administrators, both clerical and lay. Canons 1284, 1286, and 1287 enumerate that administrators must:

- Be vigilant that the property entrusted to their care is not lost or damaged. Insurance policies are to be purchased, when indicated.

⁷⁸ *Code of Canon Law: Latin-English Edition* (Washington, DC: Canon Law Society of America, 1989), Canon 208.

⁷⁹ *Code of Canon Law*, Canon 228, §2.

⁸⁰ *Code of Canon Law*, Canon 212, §2.

- Take care that Church property is civilly protected.
- Comply with both canon and civil law or those imposed by a founder, donor, or other legitimate authority.
- To be on guard that no damage comes to the Church from the non-compliance of civil laws.
- Collect receipts (donations, interest, etc.) accurately and on time. In addition, protect what is collected and ensure that they are used according to the intention of the founder, donor, or legitimate norms.
- Ensure timely payment of interest due on loans or mortgages and repayment of capital debts.
- Invest the money that is left over after expenses have been paid, with the consent from the ordinary.
- Keep a well-organized record of receipts and expenditures.
- Prepare a report of the administration at the end of the year.
- Organize, protect, and archive the documents and records on which the property rights of the Church are based. Deposit original copies of them in the archive of the curia.
- It is strongly recommended that a budget of income and expenses is prepared each year.
- When it comes to the employment of workers, administrators are to meticulously comply with civil laws concerning labor and the Church's principles regarding social policy. Employees are to be paid a just and decent wage so that they are able to provide for their own needs and those of their dependents'.
- Administrators, clerical and lay, are to present an annual report to the local ordinary who in turn is to present it for examination to the finance council.
- The faithful are to be provided an account by administrators concerning the goods given to the Church by the faithful.

Administration as Stewardship A Response to the Call of Discipleship and a Way of Living

The gift or charism of administration is a dimension of stewardship and, therefore, a category of Catholic social teaching. Catholic social doctrine, at baseline, is motivated by love.

Social outreach has been the work of the Church from her very beginning, having inspiration in the ministry of Jesus. The principles of social doctrine, an essential part of Catholic faith, have been set out in various Church documents beginning with Pope Leo XIII's encyclical *Rerum Novarum* and vary in length. William J. Byron listed ten in his

article for America Magazine: human dignity, respect for human life, association, participation, preferential protection for the poor and vulnerable, solidarity, stewardship, subsidiarity, human equality, and common good.⁸¹ He noted that these principles lead to something: prompt activity, impel motion, and direct choices. “A principled person always has a place to stand, knows where he or she is coming from and likely to end up.”⁸²

The term, “stewardship,” however has devolved, within current church parlance, into a euphemism for, “time, talent, and treasure” or, worse, for matters solely related to fund-raising or money. In the ancient world, a steward was a manager who acted on behalf of an owner. The steward was not simply a custodian but a fiduciary. “An *oikonomos* or steward is one to whom the owner of a household turns over responsibility for caring for the property, managing affairs, making resources yield as much as possible, and sharing the resources with others. The position involves trust and accountability.”⁸³ The steward was one who was “in the middle.” They were the ones to whom responsibility was delegated and of whom much was expected. They were both leaders and administrators. People in today’s world live the same way as those ancient stewards, that is, between God and neighbors.

⁸¹ William J. Byron, “Ten Building Blocks of Catholic Social Teaching,” *America: The National Catholic Weekly* (October 31, 1998), <http://www.americamagazine.org/issuc/100/ten-building-blocks-catholic-social-teaching> (accessed August 2, 2015), 2-4.

⁸² *Ibid.*, 1.

⁸³ United States Conference of Catholic Bishops, “Stewardship,” United States Conference of Catholic Bishops, <http://www.usccb.org/beliefs-and-teachings/what-we-believe/stewardship/index.cfm> (accessed August 2, 2015), 19.

A theology of stewardship is rooted in the biblical stories of creation. God created the world and found it to be good. Creation is entrusted to humanity and is to be safeguarded and cared for in such a way as to honor God. Further, humanity is called to participate in God's ongoing creative activity. The responsibility is great and the gifts of creation are to be returned to the Father with an increase. Each person has been given a different "sum;" a different mix of talents, opportunities, challenges, strengths, weaknesses, etc., that is uniquely his or her own. Each will be judged according to what was done with what was given.

Spirituality is a response to the call of discipleship and a way of living. It is the way that God transforms people into the best version of themselves. A spirituality of stewardship is characterized by restraint, giving, and sharing. It has as its hallmarks moderation and simplicity of life, environmental ecology, financial accountability and transparency, evangelization, catechesis, solidarity (social justice), collegiality, and collaboration. It is thus all encompassing and not just about, "time, talent, and treasure." "...A true theology of stewardship requires a form of conversion that allows individuals to accept that managing 'God's resources' in every aspect of life is an integral part of Christian discipleship and, therefore, not optional for individuals or churches."⁸⁴

In the Forward of Ann Garrido's book, *Redeeming Administration: 12 Spiritual Habits for Catholic Leaders*, Fr. Olinger notes that administration has been seen as a ministry from the time of St. Paul's writings. In Acts 6:1-6, the need for assistants was solved with choosing seven reputable men to serve at table and attend to the daily

⁸⁴ Daniel Conway, project director, *The Reluctant Steward Revisited. Preparing Pastors for Administrative and Financial Duties: A Report and Commentary on a Study Conducted by Saint Meinrad School of Theology with funding from Lilly Endowment Inc.* (St. Meinrad, IN: St. Meinrad School of Theology, 2002), 9.

distribution so that no widow would be neglected. The intended outcome for this division of labor was for the Twelve to devote themselves to prayer and the ministry of the word of God.

Administration is organizational stewardship. “Organizations need pastoral care every bit as much as individuals...”⁸⁵ Administrators are to be life-giving to people and to the organizations on which people depend for their livelihood. In an organizational context, to be life-giving is to be loving and respectful, efficient, prudent, reliable, committed to excellence, and productive. It is to avoid sloth and waste. It is to remain grounded in the notion that resources are communal and actions impact a community of people. It is to recognize that the work of administration is essential to the flourishing of the mission of an organization. Success in administration provides the foundation to carry on mission. “...The work of administration has as legitimate a claim on the Gospel and the Christian mission as does the more explicit and easily identified work of preaching or teaching or healing.”⁸⁶ This includes the smallest personal actions to community-wide endeavors.

Theoretical Framework: A Survey of Current Literature

The time for action is now

The topic of administration is “trending” within Church circles. Certainly one of the main catalysts of these observations, discussions, and writings has to do with constrained resources, namely the shortage of priestly vocations. Right on the heels of this motivator is that the Church has been plagued by embezzlements, fraud, and other

⁸⁵ Garrido, *Redeeming Administration*, x.

⁸⁶ Donald Senior, *The Gift of Administration*, xxvi.

organizational irregularities. In 2014, Charles Zech wrote that, “...some 85 percent of U.S. Catholic dioceses had experienced fraud or embezzlement over the last five years.”⁸⁷ Finally, priests’ seminary training generally does not encompass parish administration. In truth, their first vocation is ministry to people, which takes time and proximity, and not to organizations.

This body of work is grounded in the notion that good management is essential to mission and a crucial ministry of the Church. It is largely organized around the idea that business and nonprofit sectors have much to offer the Church when it comes to administrative best practices. In short, the Church deserves to be managed with the highest level of care, ethics, and accountability. Some of these offerings include:

- Leadership and governance
- Transparency and accountability in planning, financial reporting, and decision-making
- Budgeting
- Internal controls
- Collaboration with lay experts
- Risk management
- Real estate and personal property
- Fundraising
- Technology
- Communication, including consultation, decision-making, and informing stakeholders.
- Marketing and promotion
- Personnel management, including conflict management and performance appraisal
- Project performance metrics
- Efficiency balanced with relationship and mission
- The education of seminarians and priests in business practices and administration
- The education of laity in pastoral administration

⁸⁷ Charles E. Zech, “Best Practices in Parish Internal Financial Controls,” in *A Pastor’s Toolbox* in *A Pastor’s Toolbox: Management Skills for Parish Leadership*, ed. Paul A. Holmes (Collegeville, MN: Liturgical Press), 73.

Leadership is purposely listed first. Leadership is foundational and key to the success of any and every endeavor, whether or not it has to do with Church administration. Several authors' works have been read within the context of this project, including that of Chris Lowney, Ann Garrido, Donald Senior, Daniel Goleman, Richard Boyatzis, Annie McKee, Viktor Frankl, Jonathan Sacks, Richard Rohr, Notker Wolf, Enrica Rosanna, Stephen Covey, and John Maxwell. Goleman, Boyatzis, McKee, Frankl, Covey, and Maxwell write from a secular perspective. Senior, Sacks, Rohr, Wolf, and Rosanna offer insights framed within religious traditions, including Passionist, Jewish, Benedictine, Salesian, and Franciscan. Lowney's writing bridges a background as a former Jesuit seminarian to his work in the corporate (JP Morgan) and nonprofit (Catholic Health Initiatives) sectors. Garrido is a Catholic theologian, parish minister, and administrator in higher education. As diverse as these backgrounds are, the authors converge on a specific style of leadership that is commonly referred to as servant leadership whose authority is defined by how they author life. Leadership is not defined by the size of the platform of influence or scale of opportunity but by the quality of a leader's response to a given circumstance. Servant leaders approach life in an integrated way and their characters and habits include:

- Self-awareness and self-regulation. They first understand and are able to manage, and even laugh at, themselves. All leadership begins with self-leadership.
- Emotional intelligence. Moods and actions have an enormous impact on others.
- Humility. They walk with people. They lead from the bottom-up and inside-out.

- Service. Authentic power is the service to others. Maxwell notes that, “I believe the true measure of leaders is not the number of people who serve them but the number of people they serve.”⁸⁸
- Integrity. They understand the power of personal example. In Jesus’ words, “Follow me.”
- Prayer and reflection. The immeasurable worth of withdrawing to a sacred space refreshes and recharges.
- Ingenuity. Innovate, adapt, and embrace an ever-changing world.
- Love. Engage others with empathy and a positive attitude that uncovers talent and unites teams. Love transforms minds and hearts. It is salvific. “No one can become fully aware of the very essence of another human being unless he loves him.”⁸⁹
- Courage. They dare to envision and implement the impossible. They are motivated for the sake of achievement.
- Vision. They imagine and carry “the big picture.”
- Respect. Honor the uniqueness, individuality, freedom, and dignity of each person entrusted to them.

As to how one acquires the characteristics of a leader, Abbott Wolf in his book denies that leadership can be learned. Lowney, however, boldly makes that claim that we are all called to lead within our own areas of engagement: work, church, home, schools, neighborhoods, etc. “Everyone is a leader, and everyone is leading all the time – sometimes in immediate, dramatic, and obvious ways, more often in subtle, hard-to-measure ways, but leading nonetheless.”⁹⁰ In the forward to the 25th anniversary edition of *The 7 Habits of Highly Effective People*, business consultant Jim Collins notes that the book is not just about personal effectiveness but about leadership development. The book’s advice is accessible to all, not just those in *de facto* leadership positions. Maxwell notes, “Leadership is a choice you make, not a place you sit. Anyone can choose to

⁸⁸ John C. Maxwell, *The 360° Leader: Developing Your Influence from Anywhere in the Organization* (Nashville: Thomas Nelson, 2011), 289.

⁸⁹ Viktor E. Frankl, *Man’s Search for Meaning* (Boston: Beacon Press, 2006), 111.

⁹⁰ Chris Lowney, *Heroic Leadership: Best Practices from a 450-Year-Old Company that Changed the World* (Chicago: Loyola Press, 2003), 17.

become a leader wherever he is. You can make a difference no matter where you are.”⁹¹

Goleman, Boyatzis, and McKee note, “Great leaders, the research shows, are made as they gradually acquire, in the course of their lives and careers, the competencies that make them so effective. The competencies can be learned by any leader, at any point.”⁹²

Sacks resolves the seeming contradiction that is embedded in the idea that all are called on to be leaders. That is the answer to the question, “Who is left to follow?” The resolving concept is covenantal; we are all responsible for one another. “Therefore if we are all responsible for one another, we are all called on to be leaders, each within our sphere of influence – be it within the family, the community, the organisation (*sic*), or a larger grouping still.”⁹³

Without a “sponsor” at either the diocesan or parish level, then change with respect to administrative practices will not be effected. The term, “sponsor,” is borrowed from the corporate world and is an organizational leader. Within the context of the church, a “sponsor” is a diocesan or parish leader, such as a bishop or pastor. The leader “sponsor” transparently articulates the sought after change, ensures that the appropriate personnel are assigned to a given task, reviews outcomes, and holds people accountable. There can be no backseat drivers.

The blessing of crisis is that it prompts introspection and results in the gifts of action and change. To maintain credibility, institutional viability, and to avoid bankruptcy, the Church must identify and implement operational best practices from the

⁹¹ Maxwell, *The 360° Leader*, 7.

⁹² Daniel Goleman, Richard Boyatzis, and Annie McKee, *Primal Leadership: Realizing the Power of Emotional Intelligence* (Boston: Harvard Business School Press, 2002), 101.

⁹³ Sacks, *Lessons in Leadership*, 179.

business and nonprofit sectors that would enhance the health and vitality of dioceses and parishes. The days of easy money are long gone. The Church must compete for charitable dollars. It is also necessary to find efficiencies that reduce costs, free up labor not suited for a particular kind of work, build collaboration, and leverage core competencies. The world has become a complicated place. Societies are laced with rules and regulations that make it easy for costly organizational slip-ups.

Amid wonderful models of parish management are situations of egregious administrative landscapes that have been brought to light by scandal and bankruptcy. “The Church is not a business” is a tired, worn-out refrain. Let’s make it so that if the Church were a business, it would not fail. Examples of poor accounting practices, minimal to no oversight and accountability, lack of transparency, etc., are all too easily identified or, worse, publicized both nationally and locally. All this and malfeasance too. Every bit of this hurts the credibility of the Church and impacts the generosity of churchgoers. Responsible use of resources is good stewardship and not just good management. Further, “those ‘material’ realities provide the environment in which the more spiritual realities can be incarnate, and in many ways those material realities set the tone for the spiritual.”⁹⁴

Good administration must remain in the purview of pastors as it is essential to effective leadership. Expertise, however, is not a requirement. “While a pastor can and should delegate many of these areas of expertise to other staff (financial administration, maintenance, etc.), in order to have the moral authority to lead, the pastor must have a thorough appreciation of how essential these dimensions are for a community’s life and a

⁹⁴ Conway, *The Reluctant Steward Revisited*, 45.

basic knowledge of what is entailed sufficient to allow the pastoral leader to support their staff, to converse with them in some depth about their work, and hold them accountable on behalf of the community.”⁹⁵

Administration is to be respected as a biblical charism. Ann Garrido, Paul Holmes, Donald Senior, Charles Zech, and others have written or edited books and articles about the spirituality, skills, Scriptural mandates, and detailed guides, respectively, of administration. The United States Conference of Catholic Bishops has published papers. Organizations and universities have provided resources, learning forums, and degrees for clergy and laity.

The Leadership Roundtable is one such organization that supplies resources and keeps the momentum of change going. Leadership Roundtable, formed in 2005, offers the expertise of business leaders, including corporate C.E.O.s, college presidents, and directors of nongovernmental organizations, to the U.S. Church hierarchy. The organization is, “...laser-focused on the temporal affairs of the church: the management of people, facilities, finances, communications, and technology.”⁹⁶ It has as its goal the strengthening of the Church’s infrastructure as well as the incorporation of the expertise of the laity. Specific offerings include conferences, workshops, training for new pastors, consulting, published diocesan and parish standards for excellence, and 360-degree assessment tools.

⁹⁵ Conway, *The Reluctant Steward Revisited*, 45.

⁹⁶ U.S. Catholic interview, “Laypeople are creating a blueprint for the church’s success,” *U.S. Catholic* 80, no. 10: 28-32 (October, 2015), <http://www.uscatholic.org/articles/201510/laypeople-are-creating-blueprint-churchs-succes-30396> (accessed October 12, 2015).

Universities have begun to offer degreed programs. Villanova University in Pennsylvania offers a Master of Science in Church Management, Catholic University of America in Washington, D.C. offers a Master of Science in Ecclesial Administration and Management for clergy, Boston College offers a dual M.A./M.B.A. for students interested in church administration careers, and the University of Dallas offers a Master of Pastoral Ministry with Church Management Concentration. The Pontifical Holy Cross University in Rome will launch a church management program beginning in the spring of 2018. In 2015, the Archdiocese of New York launched a program, in conjunction with Villanova University, to train lay people in church management. Cardinal Dolan thus hopes to liberate his clergy to do more pastoral work. The Diocese of Camden in New Jersey has a similar partnership with Villanova, although on a smaller scale.

Pastors and administrators must be equipped with sufficient knowledge to capably oversee the administration of a parish and to delegate the day-to-day work of administration to those called and trained to do so. The direct results of not closing knowledge gaps are headlines (below) that horrify, embarrass, and scandalize. They are disconcertingly prevalent. Above all else, they shout for action to be taken.

- “Former Catholic Charities controller sentenced to five years in prison for embezzling \$2 million”⁹⁷
- “Church finances: Holy disorder”⁹⁸
- “Slovenia’s two archbishops resign amid financial crisis”⁹⁹

⁹⁷ Eric Heisig, “Former Catholic Charities controller sentenced to five years in prison for embezzling \$2 million,” *cleveland.com* (May 18, 2017), http://www.cleveland.com/court-justice/index.ssf/2017/05/former_catholic_charities_cont.html (accessed September 8, 2017).

⁹⁸ Alex Barker, “Church finances: Holy disorder,” *Financial Times* (January 21, 2014), <http://www.ft.com/intl/cms/s/0/7ce00cc6-7def-11e3-95dd-00144feabdc0.html#axzz3wcOKMvdl> (accessed July 25, 2015), 1.

⁹⁹ Catholic News Agency, “Slovenia’s two archbishops resign amid financial crisis,” *Catholic News Agency* (August 1, 2013). <http://www.catholicnewsagency.com/news/slovenias-two-archbishops-resign-amid-financial-crisis/> (accessed July 25, 2015), 1.

Chapter Three

Survey Methodology and Development

Overview

The development and conduct of a test is a critical component of this project even though the outcome may be a forgone conclusion. When it comes to parish administration, I anticipated that, given categories of finance, personnel, fundraising, internal controls, buildings and real estate, and technology, the outcome would be that financial matters are foremost on the minds of Cleveland's parish pastors and administrators. This will likely be the case as parish leaders have had little to no seminary or continuing education training in financial matters. Their training will include pastoral education that would lend itself to attending to human resource matters at the parish level, such that the category of personnel will not rank as an area requiring much in the way of support. My advisor said otherwise but I remained skeptical. I will nevertheless press ahead with a survey. It will be conducted via the online service, *SurveyMonkey*, as I am somewhat familiar with it, having been a participant of several surveys generated through the software. It seemed to be readily accessible, analytical tools are built into it, and the cost was minimal at \$35 per month.

In the background, having gleaned this through informal discussions with priests and parish workers, our pastors and administrators spend, in some cases, surprising and perhaps inordinate amounts of time attending to administrative matters. Administration, while an organizational ministry, is generally not a core competency of a parish priest with the exception of those that were non-traditional seminarians who earned university

degrees and had secular careers in business before being admitted to the seminary.

Freeing priests from the time they take with certain aspects of administration, through training or staffing, could partially abate the impact of vocational shortages.

Based on the outcome of the survey, learning materials were to be developed that introduce or hone skills related to the efficient administration of a parish in order to make the best use of competencies, resources, and time for the betterment of a parish and wider community through the promotion of the mission of the Church. The goal was to provide parish leaders with sufficient knowledge, but not expertise, to be able to capably appraise and evaluate people and situations related to the administration of a parish.

Survey Design

The target audience was only the pastor or administrator of a parish. A survey of all priests, rather than just pastors or administrators, could have skewed the outcome of the survey. An example of this situation is if only two priests respond to the survey, one being a parochial vicar and the other a pastor and both from the same parish.

In developing the survey, I wanted, above all else, to keep it short and easy in order to encourage participation and completion and to be respectful of a busy pastor's time. Initially, I developed a series of mostly multiple-choice questions and a few rating scales. At the advice of Fr. Mark Latcovich, one of my project committee members, I also incorporated a few questions requiring a short, open-ended answer. I also prevailed on a friend who is a statistician with the Diocese of Cleveland and the Cleveland Clinic for her review and professional opinion. She suggested organizing the questions into categories to give the survey a sense of clarity and which would aid responders as they

considered answers to questions. So after crafting an introduction and a set of directions for the survey, I organized the questions as follows:

- Parish demographics
- The pastor's or administrator's background, and
- Parish administration.

Anticipated Outcomes

Each category of questions had anticipated outcomes, information to be obtained, and theories to be investigated. The category, "Your parish's demographics," sought answers to questions of the number of registered families, annual offertory collections, and if a parish staff person was responsible for some or all of the parish's administration:

- Pastors and administrators of large parishes (many registered families) will have employees that are responsible for some or all of the parish's administrative matters. Smaller parishes may not be able to afford paid staff.
- Pastors and administrators whose parishes employ people that handle administration will spend less time with administrative matters.
- Pastors and administrators of parishes of large parishes will have offertory collections that support the employment of administrators.

The next category of questions, "Your background," sought out the background of the respondent, including non-seminary education, work experience, age, years ordained, and the number of years the individual has served as pastor or administrator:

- Those pastors and administrators having degrees or work experience in business or law have likely made the easiest transitions to the work of pastors.
- Those pastors and administrators that spent a significant amount of time as parochial vicars likely had easier transitions than those that had 5 years or less.

The last group of questions, "Parish administration," sought answers to questions and rankings of categories of administrative tasks. "Administrative matters" was defined in the introductory letter of the survey. The categories that I settled on were based on those listed in the book, *A Pastor's Toolbox*. They were financial (budgets, statements,

investments, etc.), personnel (hiring, evaluating, coaching, dismissal, etc.), fundraising (offertory collections, special projects, etc.), internal controls (theft or embezzlement prevention), buildings and real estate (maintenance, insurance, etc.), and technology (websites, social media, data security, etc.) Respondents are also given opportunities to provide rankings and comments, including listing any administrative tasks that were not covered by the survey. Respondents were also asked to rank what was most difficult as they started their work as pastors or administrators, what area of knowledge would they benefit from now, and what is most time consuming. The administrative categories remained the same throughout. There were several anticipated outcomes:

- Given that parish pastors and administrators had little to no administrative training, then the transition from parochial vicar to pastor or administrator was likely challenging. As they began their new roles, pastors/administrators may have felt unprepared to deal with the volume and diversity of the administrative duties that they were expected to carry out as leaders of parishes.
- Parish pastors and administrators do not like administrative work.
- The category of “finance” is the area likely needing the most support.
- Training programs are needed but the seminary may not be the ideal place for them. Men about to be ordained are focusing on becoming priests and not pastors or administrators.
- Pastors and administrators spend a lot of time (more than 30%) attending to administrative matters.
- I suspected that there would be other areas, besides those listed above, that pastors or administrators will offer as areas of challenge for them.
- The topics that were to be covered by the learning tools that I planned to create would be identified, by priority, in this section of the survey.

Deployment

Surveys are delivered electronically by *SurveyMonkey* to a target population via email addresses. After having inquired of several people, an email “group” of parish pastors and administrators could not be located within the Diocese. I therefore proceeded to create an email address group based on the current Catholic Directory of the Diocese

of Cleveland that is available online through the Diocese's website. The Directory names the pastor or administrator of 184 parishes and missions. The Diocesan email naming convention is the first initial of a person's first name and their full last name followed by "@dioceseofcleveland.org." There appeared to be no other conventions. The pertinent data was populated to a Microsoft Excel spreadsheet. I then used a basic command to pull the first letter or vowel of the individual's first name and finally used the "concatenate" function to combine the first initial, last name, and email suffix. I copied and saved the formulae in a "text" format for import to *SurveyMonkey*. I noted that some priests are pastors of 2 parishes and some are a pastor of one and the administrator of another.

The establishment of an account in *SurveyMonkey* was straightforward and the set up of the survey was almost completely intuitive for the brand new user having some spreadsheet or technology familiarity. If he or she wishes, the user may copy and paste from Microsoft's *Word* into the software, so that re-typing data may be largely unnecessary. The software allows the user to set the confidentiality of responses. In this case, I selected to keep respondents completely anonymous as I promised in my introduction to the survey. Settings are also available to identify respondents based on email address, etc., for the user to employ if he or she so desires. The software allows for certain types of testing. There is an internal test that previews and scores the quality of the survey ("perfect" for this one.) *SurveyMonkey* estimated a completion rate (71%) and the amount of time (10 minutes) that it would take to respond to the survey. I had the opportunity to send the survey to myself in order to see exactly what my population would see and for my own final review and edit. There is also a feature to send the

survey to others for their feedback but I declined to do so as the survey's questions were not complicated. In addition, they were reviewed by my advisor, St. Mary Seminary's President-Rector, and a statistician before deployment.

The greatest challenge was the import of the email addresses. Answers will not be parish specific because the software does not allow for duplicate email addresses for survey recipients. One address could not be imported and I could not detect the error.

The breakdown was as follows for 184 parishes and missions:

- 1 invalid email address.
- 5 priests that are named pastor of one parish and administrator of another.
- 9 priests that are named pastor of two parishes.

There were, in the end, 169 email addresses that were imported to *SurveyMonkey*. In my estimation, the single invalid email address will not in any way skew the survey's results, especially since it's my belief that there will not be a 100% response rate. As for the duplicate emails, the survey is oriented toward pastors' and administrators' experiences of parish administration that likely would not change from parish to parish. Further the number, 14, is small (less than 10%) in comparison to the population of 184. In my opinion, these again would not cause the outcome of the survey to be biased.

In the introductory letter of this survey, I identified who I was and attempted to connect to the respondent through the classrooms of the Center for Pastoral Leadership and through my husband David, the Director of the Diaconate Formation Office. I sought to establish my credibility with my audience by summarizing my thesis, my project goals, noted the names of my advisor and readers, and indicated that the survey had the Seminary's approval. I further guaranteed the respondents' anonymity and that they and their parishes would not be identified to me and not referenced in my writings. I provided a

definition of “administrative matters” since, based on some casual conversations, it seemed as if people had different ideas of what this meant and I did not want to take the chance of any misunderstanding. To encourage participation, I noted that the amount of time that it would take to complete the survey was no more than 15 minutes of time.

The survey also required a brief set of directions and I set up a separate section for them in order to capture the attention of my audience. In particular, I wanted to make sure that those who are pastors of two parishes or a pastor of one and an administrator of another parish knew to respond based on their first assignment as pastor and not to combine answers for all parishes to which they are assigned.

The survey was finalized and sent on Wednesday, November 15, 2017 just before midnight and the first responder answered at 2:49am on Thursday. I was encouraged! I planned to send a reminder after the Thanksgiving holiday to those that did not complete the survey and then to close the survey in the early days of December. *SurveyMonkey* includes features that will automatically send an email reminder to those that did not start and those that did not complete the survey. The software also provides the opportunity to thank respondents. This was done when the survey closed. I anticipated a final response rate of 25-30% based on my prior work experience in private industry:

- 169 recipients x 25% = 42 (rounded) responses.
- 169 recipients x 30% = 51 (rounded) responses.
- 169 recipients x 33% = 56 (rounded) responses.

My survey did need a bit of a shape up based on the advice of one of my early responders who made three recommendations to me. I was able clarify my directions and add the new language to the survey questions in *SurveyMonkey* for future respondents, noting that numbers could only be used once where I asked for rankings. I very much

appreciated the flexibility of the software to be able to do this. I could not accommodate one of his suggestions as it would have required a change to the number of responses available to a question that already had been answered by a significant number of people.

Chapter Four

Survey Results and Analysis

Executive Summary

The invitation to participate in the survey for this project, “Parish Administration in the Catholic Diocese of Cleveland,” was delivered by email to 158 pastors or administrators out of a total of 169 that are responsible for 184 parishes and missions. The questions were designed to identify knowledge gaps for the purpose of the development of training materials to promote the efficiency of Cleveland’s parishes. They were grouped into categories of parish demographics, the pastor’s or administrator’s background, and parish administration. Administration was defined to include temporal activities that support ministry, including finances, personnel, fundraising, internal controls, buildings and real estate, and technology. Sixty-eight pastors and administrators responded by completing the 11-minute survey consisting of 22 questions in full (66) or in part (2). Personnel topped nearly every category of question or request for comment:

- When they first stepped into their roles as pastors or administrators most (42%) answered that they felt somewhat prepared. The areas where they felt their skills or knowledge fell short were related to finance followed closely by personnel.
- On a scale of 1 to 6, survey responders, as a whole, wished they knew more about personnel followed by financial matters when first named pastor or administrator.
- On a scale of 1 to 6, responders felt that they would benefit most with knowing more about personnel and then technology.
- On a scale of 1 to 6, pastors and administrators responded that their most time consuming tasks related to buildings and real estate and then personnel.

- In response to an open-ended question, their hardest or most challenging area was, overwhelmingly, personnel.
- Most (55%) responded that they spend 30-50% of their time with administrative tasks.

The topic of internal controls consistently ranked at the bottom of every category of question and did not provoke a comment from the survey's responders where they were given the opportunity.

Introduction

Efficient parish administration, a fruit of leadership, will enhance and promote the mission of the Church. Toward this end, a survey was developed and directed to the pastors of the Diocese of Cleveland to identify knowledge gaps, according to the original goal of this project, for the development of training materials to promote the efficiency of our parishes. The survey outcomes, however, were not in line with this idea and the reasons will be explicated in Chapter 5.

This chapter will be broken down into three sections. The first section will detail and analyze the outcomes of the survey that I conducted. The second and third sections will summarize the outcomes of earlier studies that should serve as benchmarks for my survey. The first one was co-sponsored by Christian Theological Seminary and Saint Meinrad Seminary in 1992 and the second study was published by Saint Meinrad Seminary in 2002. My hope is that the outcomes of my survey do not contradict the more detailed studies conducted by the seminaries.

Survey Results and Analysis: Parish Administration in the Catholic Diocese of Cleveland

The survey for this project was deployed on November 15, 2017. The invitations were sent via emails that contained a link to *SurveyMonkey*. It was sent to 169 email

addresses. The survey was not delivered to 11 of the 169 addresses, having “bounced.” *SurveyMonkey*, however, does not specifically identify the cause of the problem(s.) Two likelier reasons are that the email addresses were incorrect in terms of those that go by middle versus first names and mailboxes that were full.

The amount of time that it would take to complete the survey was accurate to 30 seconds; *SurveyMonkey* predicted 10 minutes and the actual average time was nearly 11 minutes. The survey completion rate was estimated at 71% and, of those that started it, 96% actually completed it.

The greatest number of responses came in within 24 hours and then they became much more sporadic. As of November 22, there were 51 responders. A reminder was sent on Tuesday, November 28, 2017, after the Thanksgiving holiday, and an additional 17 completed the survey. The responders were entirely anonymous to me. The survey was closed in early December.

Sixty-eight pastors and administrators responded to the survey, a response rate of nearly 43% and quite higher than the 25-30% that was originally anticipated. Sixty-six completed the survey and two answered demographic questions but skipped the questions pertaining to parish administration. *SurveyMonkey* marked these two responses as “Incomplete.” Of the 64 that answered Question #8, “What is your position at the parish?” 62 indicated that they are pastors.

Parish Demographics: Questions #1 – 4

The first *SurveyMonkey* question regarding the number of registered families in the parish, as it stands alone, is self-explanatory. Held together with Question #3, which pertains to parish staffing, it reveals a little more information as the two together validate

or invalidate the hypothesis that large parishes (those with many registered families) will have employees to which are delegated the parishes' administrative matters. As indicated in Table 1 below, the short answer is that the number of families in a parish does not have a direct correlation to staffing. Each stratum produced a nearly identical answer, except for those parishes having more than 2,000 registered families. The amazing outlier (presumptive) is that one parish at that level reported no staffing. The pastor of this parish spends, on average, 30-50% of his time on administrative matters. He answered that he loves administrative work but commented that he found it arrogant that the Church expected him to be all things to all people, all the time. Perhaps he is between administrative assistants and is, hopefully, in the process of hiring a replacement. Then again, he may delegate to a parochial vicar.

Graph 1: Question #1, How many registered families are in your parish?

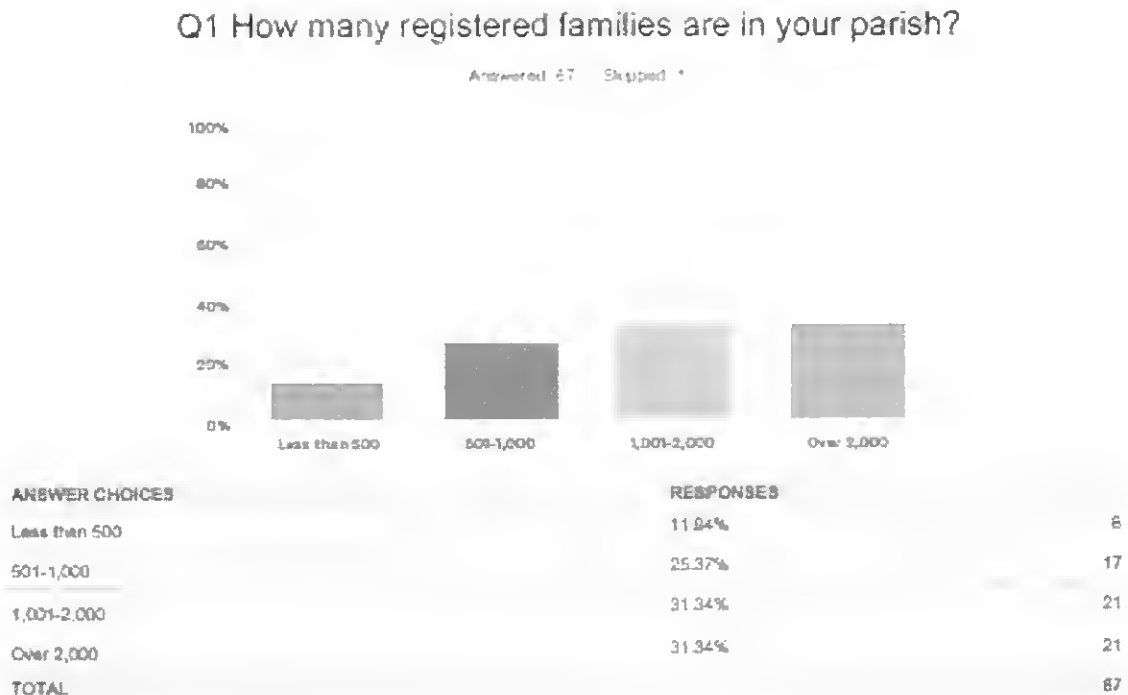


Table 1: Percentage of Parishes with Staff that Handles Some or All Parish Administrative Matters (Based on Number of Registered Families)

NO. OF REGISTERED FAMILIES	% OF PARISHES WITH STAFF	NO STAFF	STAFF HANDLES SOME ADMIN.	STAFF HANDLES ALL ADMIN.
Less than 500	5/8 = 62.5%	3	4	1
501-1,000	11/17 = 64.7%	6	9	2
1,001-2,000	14/21 = 66.7%	7	12	2
Over 2,000	20/21 = 95.2%	1	16	4
TOTAL		17	41	9

Question #2 collected data regarding average annual offertory collections.

Presumably, there is a direct correlation between a parish's level of offertory collections and its staffing. Those that have higher collections are likelier to employ a person that handles some or all of the parish's administrative matters. To prove this hypothesis, this Question's answers were analyzed in conjunction with the answers provided in Question #3. The data, summarized in Table 2 below, indicates that offertory collections do not correlate to parish having a person on staff that handles some or all of a parish's administrative matters. Of the 28 parishes reporting less than \$500,000 in collections, 64% staff a person responsible for some or all of the parish's administrative matters. At the level of over \$1,000,000 in average annual offertory collections, all reported staffing.

Analyzing the answers provided to Question #1 with Question #2 points to a reality of giving that may, in general, prohibit the hiring of capable staff for the parish. Taking the midpoint of the range of registered families (Question #1) and the midpoint of the range of average annual collections (Question #2) and then dividing the midpoint value of collections by the midpoint of the ranges of the number of families resulted in a picture of giving that was, in some cases, rather bleak. The answers ranged from an average annual contribution from \$167 to \$1,000 with a combined average of about \$500

per family. (As an aside, if given the opportunity to do this survey all over again, I would have broken down the ranges to make them mathematically even or asked for exact figures.) The data tentatively indicated that parishioners of smaller parishes were disproportionately generous in comparison to those that belonged to larger ones. This range was open-ended and this conclusion may, therefore, not prove to be true if actual numbers are requested from the parishes that fall in this range. The \$500 figure does not seem to be out the norm as a recent article in *The Economist* corroborated, “Anecdotal evidence suggests that America’s Catholics give about \$10 per week on average.”¹⁰⁰

No matter that Cleveland lines up with the national average, the reality is that \$500 is quite low. The Church tends to reason that people are burdened with debt and responsibilities, mostly as they pertain to families. However, our Protestant and Jewish brothers and sisters do not seem to see this the same way. Their consciousness is shaped by the notion of tithing.

“Researchers have long puzzled over a phenomenon that is painful even to write about: Catholics are among the stingiest denominations when it comes to religious giving. The *New York Times* once surveyed the research and reported that Baptists, for example, donate about 2 percent of their household income to religious causes, the Jewish faithful give about 1.4 percent, while we Catholics rank way down the list at 0.7 percent, trailing just about everyone.”¹⁰¹

Our families are submerged in a culture that places a priority on material goods and services: homes, cars, electronic devices, gym memberships, salons (hair and nails), entertainment, vacations, etc. This is a lot of self-serving activity and not much in the way of sacrifice. In my estimation, our families can’t be unaffected by this culture. In

¹⁰⁰ The Economist, “Earthly concerns,” *The Economist*, August 18, 2012, <http://www.economist.com/node/21560536/print> (accessed January 5, 2016), 3.

¹⁰¹ Chris Lowney, *Everyone Leads: How to Revitalize the Catholic Church* (Lanham, MD: Rowman & Littlefield, 2017), 105.

any case, this is an opportunity for catechesis pertaining to stewardship. It's not, however, recommended to take the approach that one pastor had taken many years ago. That is to walk from the sanctuary to the center aisle to throw the pennies from the collection basket to the floor and declare to the stunned congregation that he could not do anything with tiny sums of money. A gentler approach is for the pastor or administrator to connect his people to the reality that they, individually, make a significant difference to the life of the parish. One suggestion would be for the pastor to present the parish's annual financial statements in terms of positive impact: new parishioners, community service, outreach to the poor and disenfranchised, mission support, etc. In other words, to share detailed instead of superficial financial information with parishioners. The pastor must be comfortable with these conversations with his parishioners. A monthly donation of \$80 to \$100 per family should not be out of the realm of expectation.

Graph 2: Question #2. What is your average ANNUAL offertory collection total?

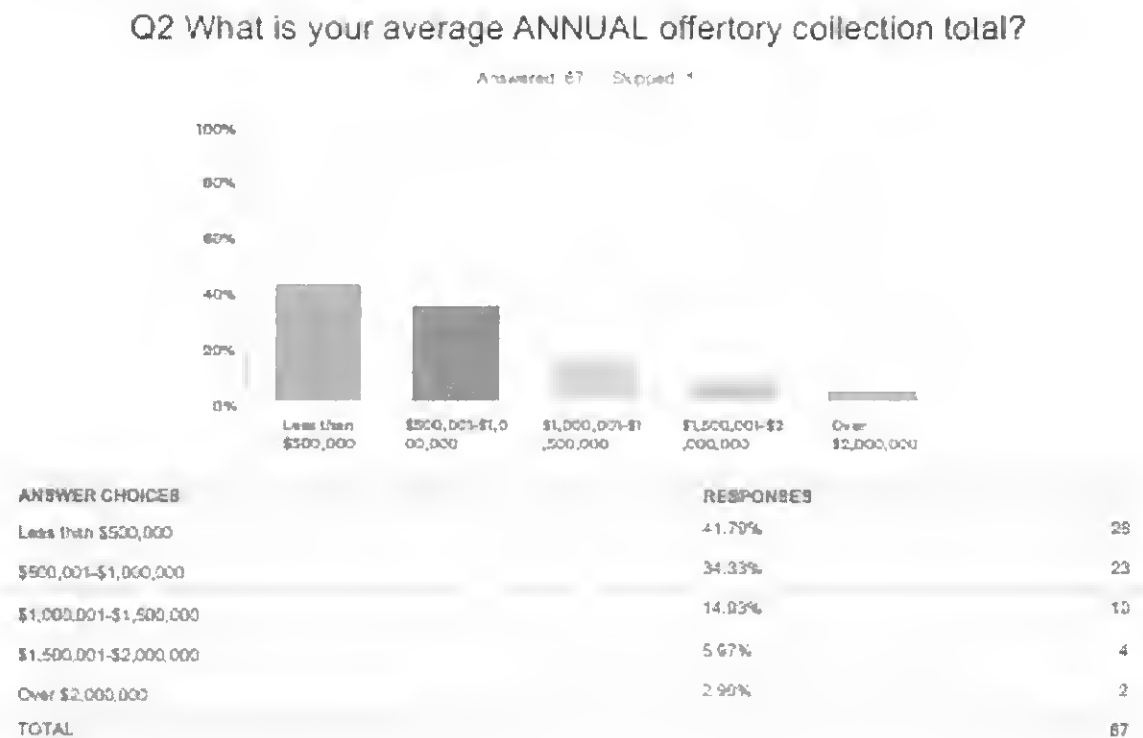


Table 2: Percentage of Parishes with Staff that Handles Some or All Parish Administrative Matters (Based on Average Annual Offertory Collections)

AVERAGE ANNUAL OFFERTORY COLLECTIONS	% OF PARISHES WITH STAFF	NO STAFF	STAFF HANDLES SOME ADMIN.	STAFF HANDLES ALL ADMIN.
Less than \$500,000	18/28 = 64.3%	10	15	3
\$500,001-\$1,000,000	16/23 = 69.6%	7	15	1
\$1,000,001-\$1,500,000	10/10 = 100%	0	5	5
\$1,500,001-\$2,000,000	4/4 = 100%	0	4	0
Over \$2,000,000	2/2 = 100%	0	2	0
TOTAL		17	41	9

Several pastors selected one of the “Yes” answers to Question #3 and then named themselves as the person responsible. One pastor did not answer the question but named himself as the person responsible for administrative matters. The original 67 responses to Question #3, in the bar graph below, were therefore adjusted to a total of 68 responses for those pastors that named themselves as the person responsible for all or some administrative matters. Therefore, eighteen and not ten parishes have no staffing to which administrative matters are delegated, as indicated in Table 3 that is situated below Graph 3.

Graph 3: Question #3, Is there a person at your parish, other than yourself, who is responsible for some or all administrative matters?

Q3 Is there a person at your parish, other than yourself, who is responsible for some or all administrative matters?



Table 3: Q #3 Restated for Pastors that Responded “Yes” and Indicated “Pastor” as Person Responsible for Some or All Administrative Matters

ANSWER CHOICES	RESPONSES	RESPONSES
Yes, the person is responsible for ALL administrative matters.	13.24%	9
Yes, the person is responsible for SOME administrative matters.	60.29%	41
No.	26.47%	18
TOTAL		68

Question #4 requested an open-ended response to the question, “If you answered ‘yes’ to question #3, what is the title of the person that is responsible for some or all administrative matters at your parish?” Fifty-eight responders provided titles and ten skipped the question. Some noted “pastor!” The titles of those to whom administrative

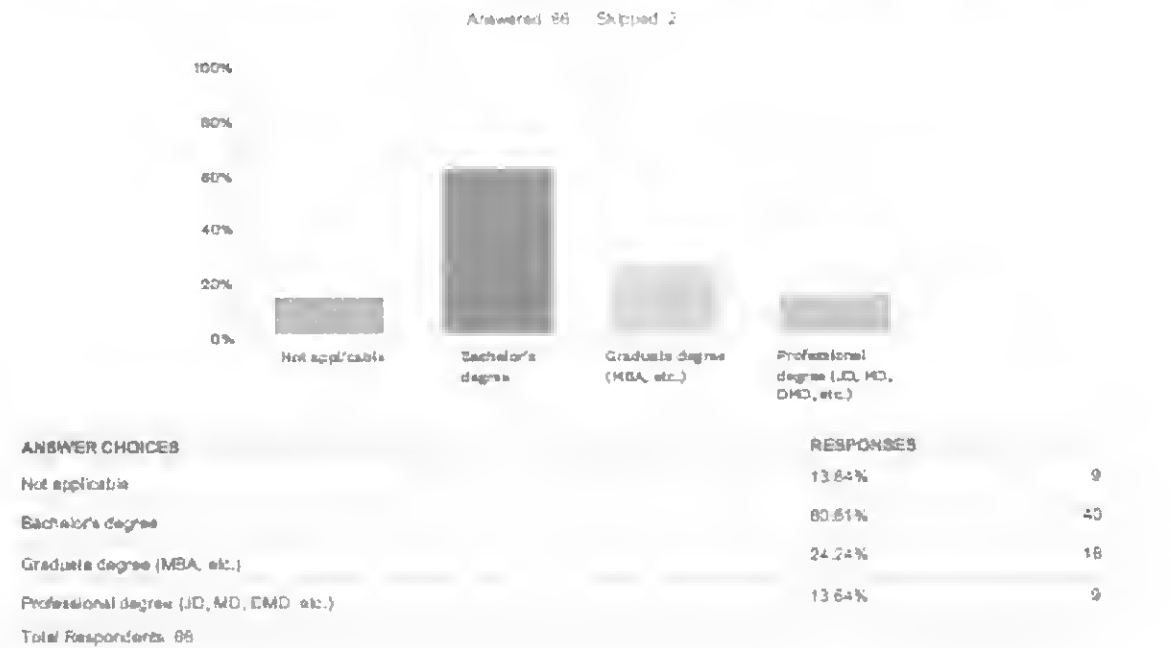
tasks are delegated are varied, including “business manager,” “office manager,” and “administrative assistant.” Overall, 33 pastors/administrators reported having an individual holding the title “manager.” The title most often reported was, “business manager.” See Appendices B and C for details. The titles of these persons may point to an issue of under-staffing if the responder reported that he spends more than most with administrative tasks. The survey’s details indicated that a pastor or administrator that delegates to an administrative assistant or to a secretary spends more time, on average, than one who employs a business manager: about 50% versus 41%.

Pastor’s or Administrator’s Background: Questions #5 – 12

The responses to Questions #5 through #8 should correlate to the answers to Question #13. Presumably, those having degrees (non-seminary or theology) or work experience (before entering the seminary) related to business or administration should have had an easier transition to parish administrative responsibilities as new pastors. See Appendix C for the analysis of the responses to Questions #6 and #7 as indicators that may predict easier transitions to the role of pastor. Fourteen of the 66 that answered Question #5 had earned degrees in business, accounting, law, or dentistry or had work experience in business, among them a purchasing agent, accountants, lawyers, and a small business owner. Of the 14, eight indicated that they felt prepared (Question #13) to undertake the administrative responsibilities of a parish pastor and three felt somewhat prepared. Interestingly, the former restaurant manager and small business owner did not feel prepared at all.

Graph 4: Question #5, Besides seminary degrees, what other educational background do you have?

Q5 Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.



Based on the outcomes of *The Reluctant Servant* studies (reviewed later in this chapter), those that served as parochial vicars for greater lengths of time made easier transitions to their roles as pastors, including the related administrative responsibilities. From a practical standpoint, this makes complete sense as long as the parochial vicars were involved with the administrative duties at their parish assignments prior to becoming pastor. My survey pointed to the same answer, but not conclusively. (In retrospect, specific answers instead of ranges would have enhanced analysis and conclusions.)

In an *Excel* spreadsheet of the Survey's details that was downloaded from *SurveyMonkey*, the answers to Question #12 regarding the number of years ordained were analyzed in conjunction with the answers to the number of years that individual served as

pastor or administrator (Question #9) along with these same individuals' responses to Question #13 regarding their level of comfort when first stepping into the administrative responsibilities of a pastor. Table 4 (located just below Question #12's bar graph that follows this commentary) intersects the answers provided to Questions #9 and #12. These answers combined with their answers to Question #13 indicate that a lengthy tenure as a parochial vicar is not the only way to gain comfort when taking on the responsibilities of a pastor. Of the 41 that answered Question #13, 22 felt prepared to take on the administrative responsibilities of the role:

- Eleven (50%) of the 22 were ordained 26 years or more. Ten of these have been pastors for 13 years or more.
- Four (18%) were ordained for 16-25 years.
- Seven (32%) were ordained for 6-15 years.

Most intriguing of the lot of these bullet-points is the last one as it contradicts the hypothesis made by *The Reluctant Servant*. All but one of the seven had post-secondary degrees or work experience that would reasonably predict a greater comfort level with the administrative responsibilities of a new pastor. One holds a master's degree in non-profit administration. Six had work experiences that included sous chef, business owner, and accountant. The remaining one has both an office manager and a business manager on staff at his parish assignment. His good fortune is, apparently, to have excellent staffing. These answers validate my hypotheses that those pastors having degrees, relevant work experience, or lengthy tenures as parochial vicars had easier transitions to the administrative work of pastors.

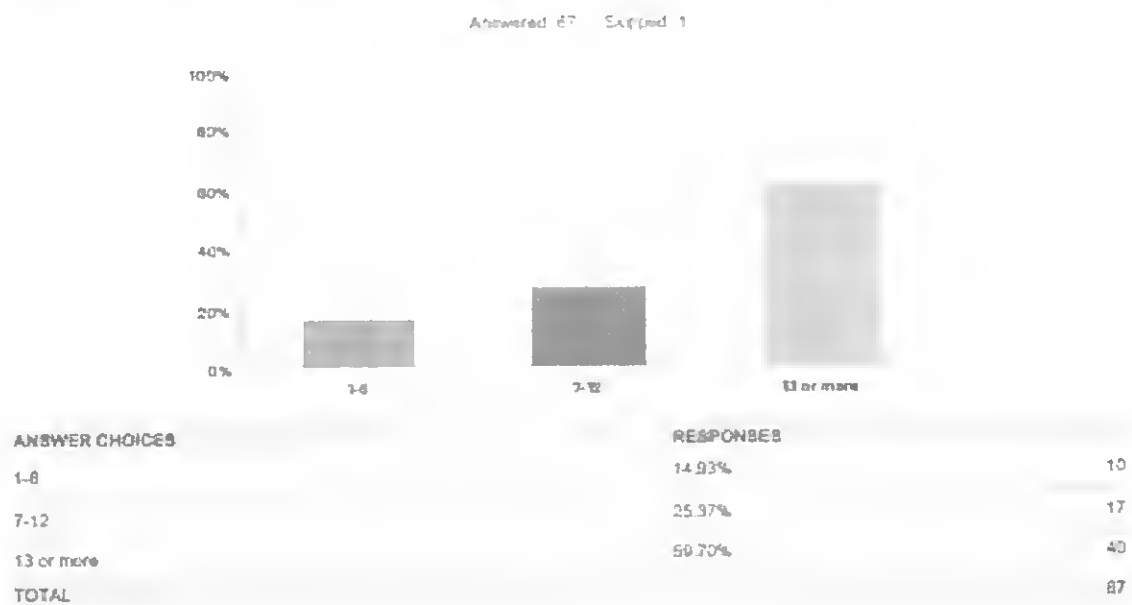
It appears that most (48) respondents are at the parishes to which they were first named pastor. This could be misleading because answers are provided in ranges. This is both good and not so good. Good as the lack of turnover is a stabilizing force. Not so

good as thinking sometimes becomes entrenched and, worse, may suppress creativity and change.

This data also points to a significant body of pastors that is greying! Nearly one-third are older than 67. The eligible age for retirement for Diocesan priests in Cleveland is 75. The rate of ordination may not be keeping pace with the rate of retirement. If this is the case, then planning for the future leadership of Cleveland's parishes should be of paramount importance.

Graph 5: Question #9, How many years have you been a pastor or administrator?

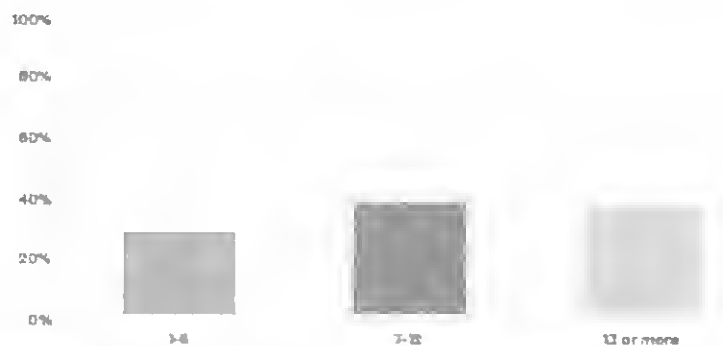
Q9 How many years have you been a pastor or administrator? Include the time that you served as pastor or administrator of another parish or parishes.



Graph 6: Question #10, How many years have you been at your current parish?

Q10 How many years have you been at your current parish?

Answered: 67 Skipped: 1



ANSWER CHOICES

1-6

7-12

13 or more

TOTAL

RESPONSES

26.87%

37.31%

35.82%

18

25

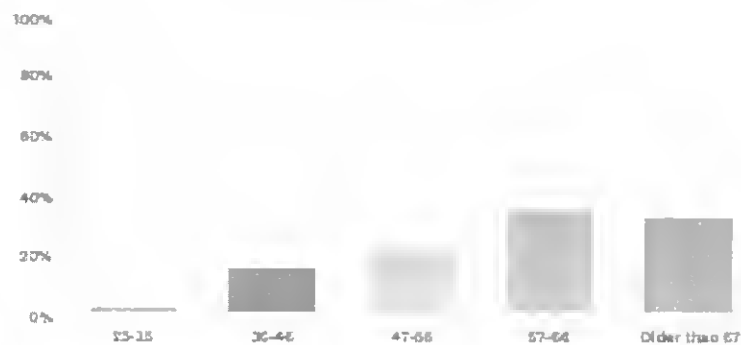
24

67

Graph 7: Question #11, What is your age?

Q11 What is your age?

Answered: 67 Skipped: 1



ANSWER CHOICES

25-35

36-46

47-56

57-66

Older than 67

TOTAL

RESPONSES

1.49%

14.93%

19.40%

32.84%

31.34%

1

10

13

22

21

67

Graph 8: Question #12, How many years have you been ordained?

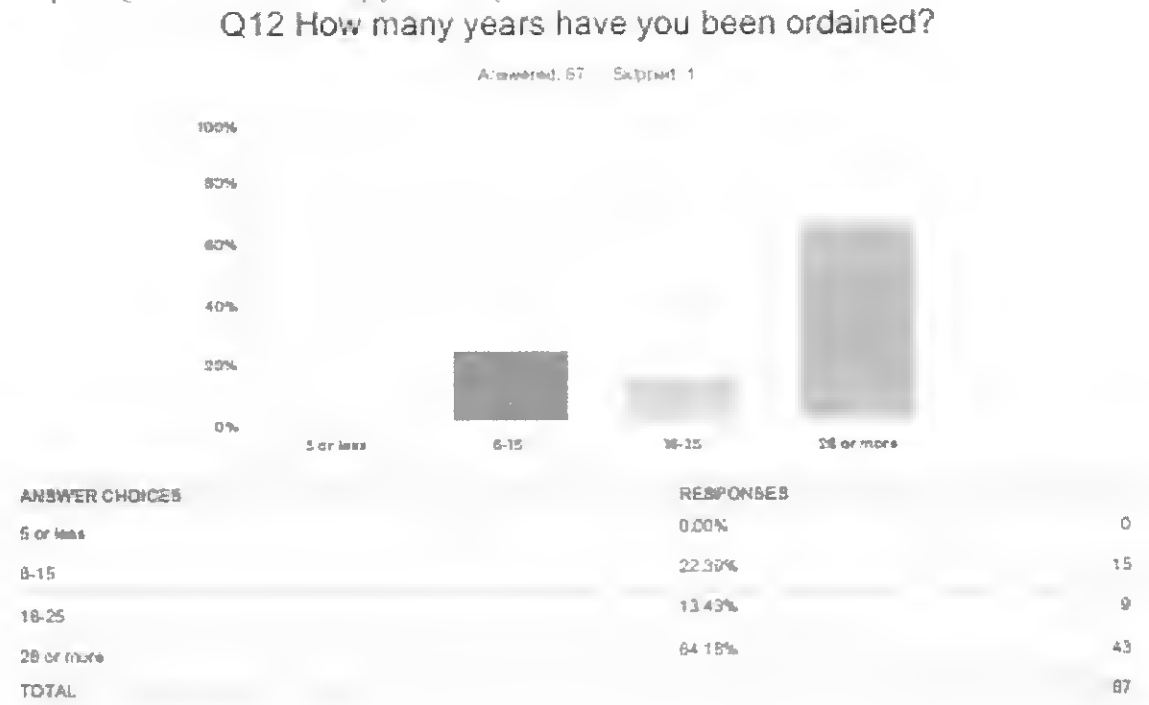


Table 4: Years Ordained (Question #12) Intersected with Years of Service as Pastor or Administrator (Question #9)

YEARS ORDAINED	1-6 YEARS AS PASTOR/ADMIN.	7-12 YEARS AS PASTOR/ADMIN.	13 OR MORE YEARS PASTOR/ADMIN.
6-15	8	7	0
16-25	1	6	2
26 or more	1	4	38
TOTAL	10	17	40

Parish Administration: Questions #13 - 22

The answers to Question #13 were nearly evenly split among the answers, “Yes,” “No,” and “Somewhat.” Most answered, “Somewhat.” A detailed analysis of those that responded with “Yes” was previously provided above in Question #12. Those answering “Somewhat” were invited to list the areas where their knowledge or skill set was not sufficient. Each responder accepted the invitation. Of the 27 in this stratum, three (11%)

had degrees or work experience that would point to a greater comfort level with parish administrative responsibilities as new pastors, including dentistry, purchasing, and accounting. Their open-ended answers to Question #14 are summarized in Table 5 that follows the bar graph just below this paragraph. Note that, in some cases, the 27 responders indicated more than one category of challenge. “Human resources” specifically included comments such as diplomacy, managing people, hiring, and conflict management that had implications not only for issues pertaining to staff but also for leadership. “Finance” included the tasks of reading a financial report, budgeting, bookkeeping, paying taxes, payroll, and expense categorization. Other comments noted fundraising, leasing properties, Diocesan procedures, employee contracts, property maintenance, and insurance. See Appendices B and C for details. Those that answered, “No,” were not requested to provide details simply because it was assumed that every category of administration was a challenge to him as a new pastor. Only 3 of the fifteen (20%) in this stratum had degrees or work experience that would have predicted an easier transition to the administrative responsibilities of a pastor, including a former lawyer, restaurant manager, and a law firm office manager.

Graph 9: Question #13, When you first stepped into the role of pastor or administrator, did you feel prepared?

Q13 When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?

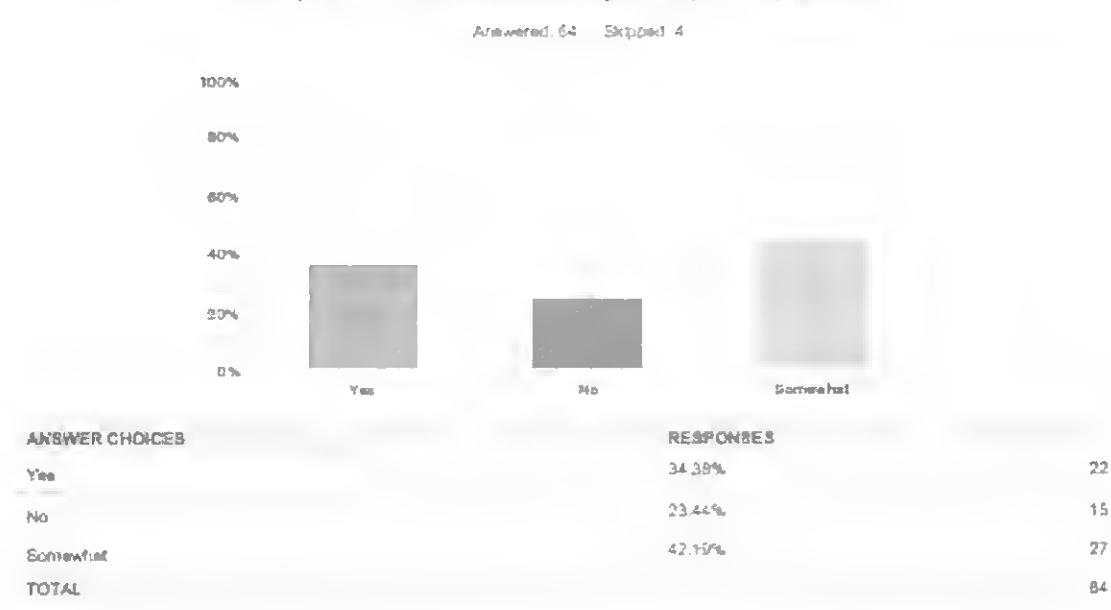


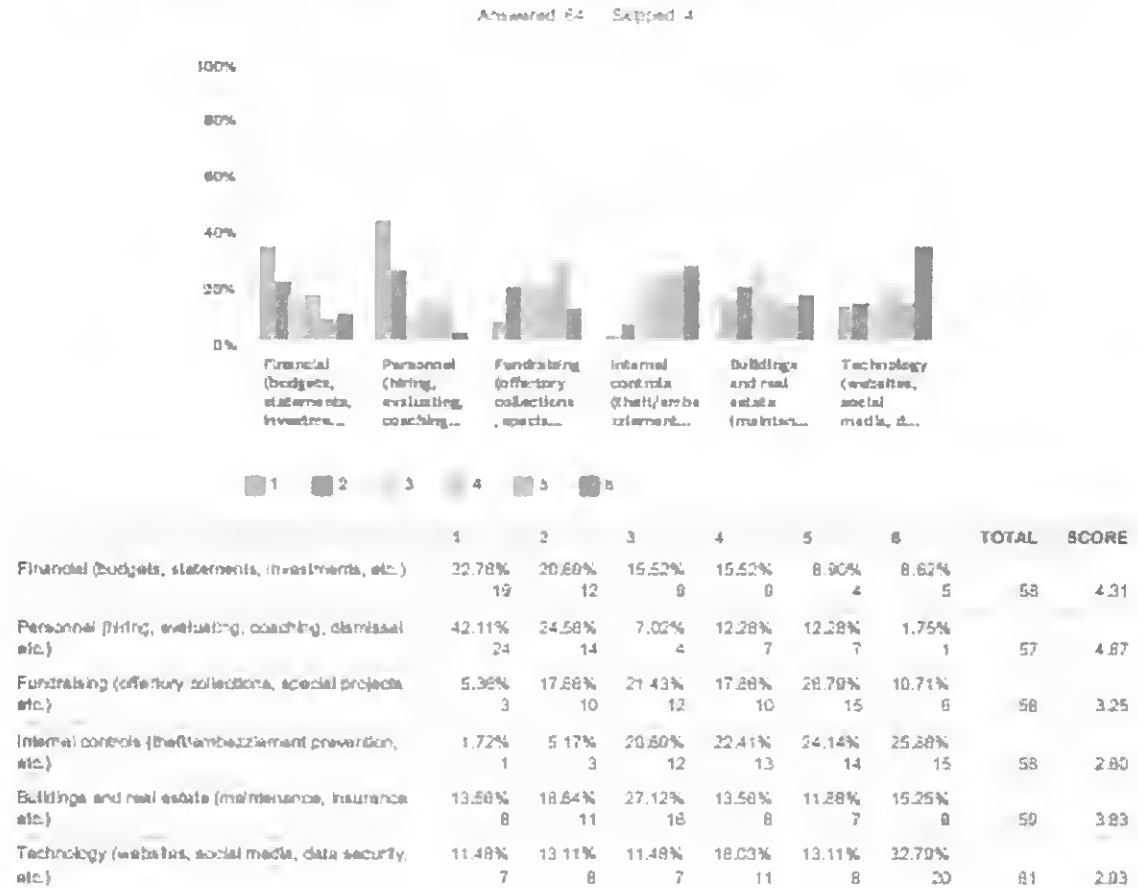
Table 5: Topical Summary of Open-Ended Answers to Question #14, “If you answered ‘Somewhat,’ (to Question #13) in what area or areas was your skill or knowledge not sufficient?”

	FINANCE	HUMAN RESOURCES	FUNDRAISING	LEGAL	REAL ESTATE	PLANNING
TOTAL	14	13	5	4	3	2

Echoing the commentary provided by those that answered that they were somewhat comfortable stepping into the administrative tasks of a parish when first becoming pastor (Question #13), most wished they knew more about matters related to personnel and then finances in answer to Question #15.

Graph 10: Question #15. Given what you now know, what did you wish you knew when you first became pastor or administrator?

Q15 Given what you now know, what did you wish you knew when you first became a pastor or administrator? 1 being most important and 6 being least important? Note that a number may only be used once.



Question #16 gave responders the opportunity to weigh in on what they believe will expand or improve their own skill sets. The area of “Personnel” was prioritized with “Technology” a close second. “Fundraising” followed, a bit more distantly, on the tails of these categories. Twelve responders took the opportunity to suggest additional categories by providing open-ended responses to Question #17. They include pastoral planning, legal matters (contracts), leadership, compliance with Diocesan and governmental requirements, managing difficult people, attending to those with special

needs (language and handicaps), volunteer recruitment, and time management.

Appendices B and C provide additional details.

Graph 11: Question #16. In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time?

Q16 In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.

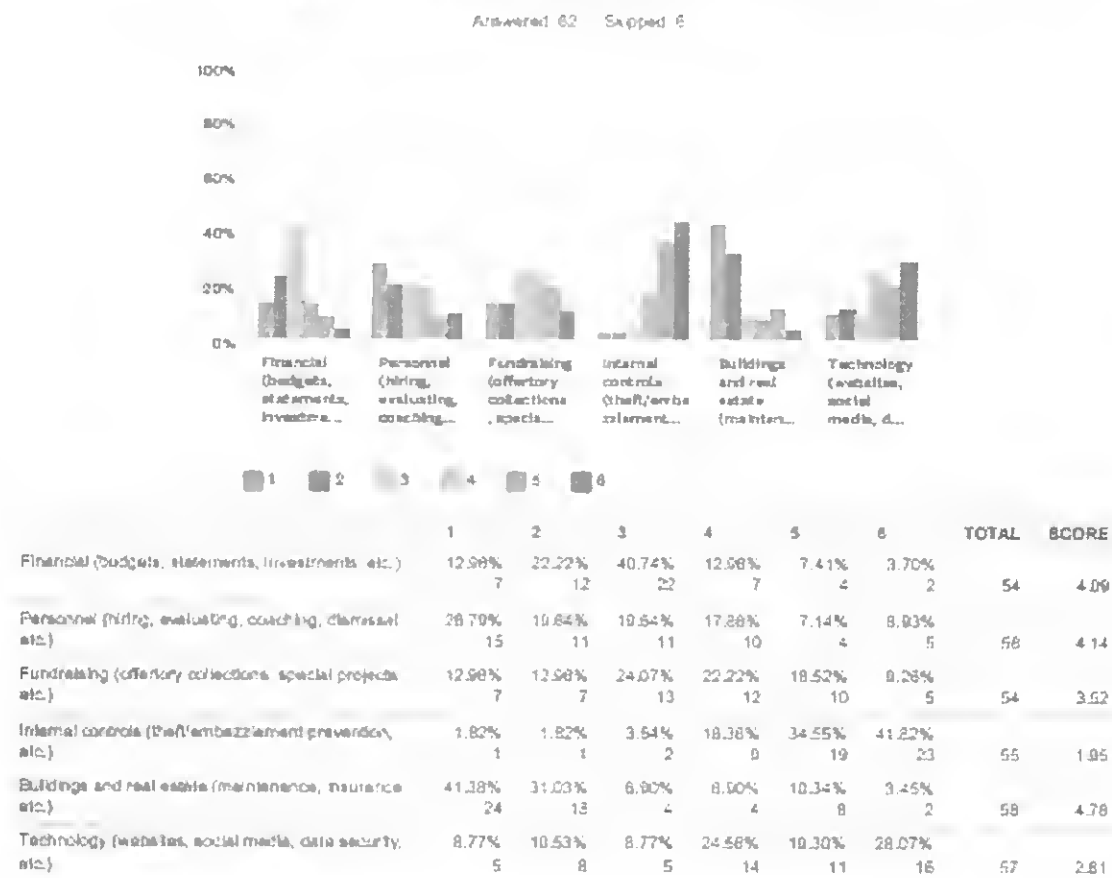


With respect to administrative tasks that are most time consuming, Question #18 provided a surprising result. The unexpected and overwhelming lead is the amount of time that buildings and real estate take for pastors. It was ranked as “1” and “2” by 24

and 18 of 62 responders, respectively. Personnel and finance ranked second and third, respectively.

Graph 12: Question #18, On average, what is your most time consuming administrative task?

Q18 On average, what is your most time consuming administrative task?
1 being most time consuming and 6 being least time consuming? Note that a number may only be used once.



In concluding the analysis of the responses to the questions that required rankings from survey participants, it should be noted that, while the categories of personnel, financial, and building and real estate gained the highest rankings, overall, from responders, the category of internal controls consistently ranked at the bottom. Both Questions #15 and #18 had a single responder rank that category with “1.” None of the responders indicated that they would benefit from additional training on the topic of

internal controls (Question #16). Church fraud and embezzlement is a startlingly common occurrence, "...some 85 percent of U.S. Catholic dioceses had experienced fraud or embezzlement over the last five years."¹⁰² A number of serious incidents were recently reported at the local level. Given the pervasiveness of this criminal activity, this outcome draws my attention. The potential answers run the gamut. It may be that the Diocesan internal auditors have helped to put controls in place in Cleveland's parishes. On the other hand, it could be that pastors have a high level of faith and trust in the people that assist them and feel that theft is a very remote possibility. Perhaps it's a combination of the two.

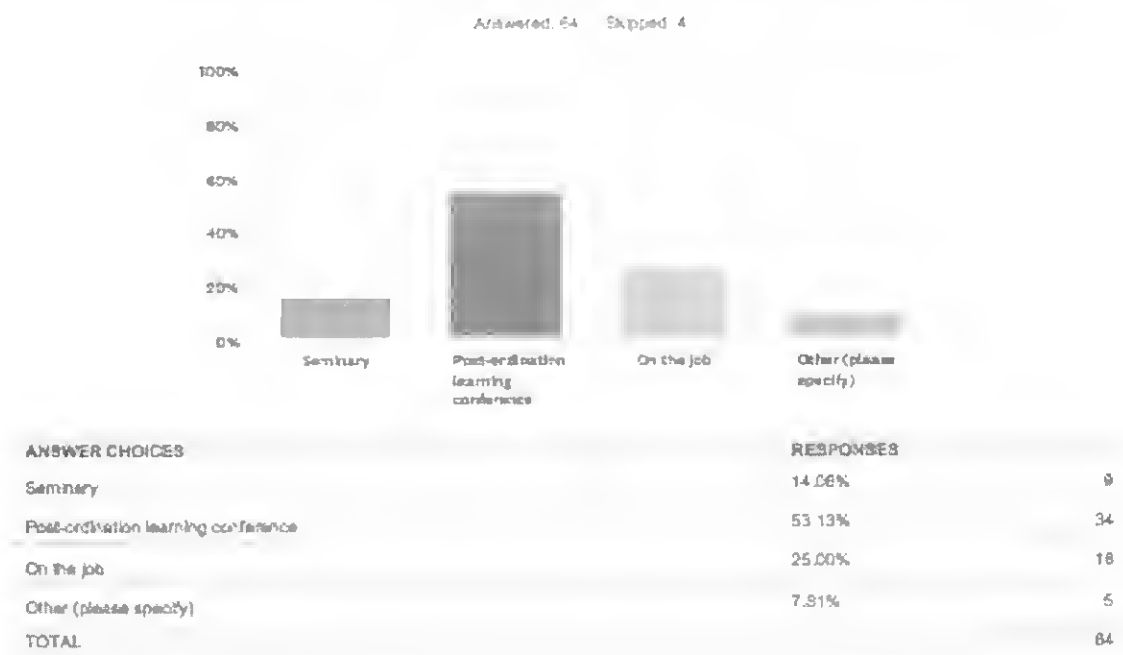
Question #19 requested respondents' opinions regarding how the skills associated with parish administration are best acquired. Over half of the respondents are of the opinion that a post-ordination learning conference is the best forum for learning the material pertinent to the administration of a parish. These types of conferences or seminars will hold the attention of those whose responsibility is proximate. That is, one who is likely to soon become a pastor or one that was newly named a pastor or administrator. This group will likely retain this material better and bring "real life" experience to the conference. The seminary is another ideal place to "capture" audiences with a required course along the lines of pastoral administration in which several of these types of topics are introduced. It must be borne in mind that at the top of seminarians' minds is priesthood ordination and not becoming a pastor. This is assuming that they are to be ordained for service to the Cleveland Diocese. Those that indicated "Other" were asked to specify their idea and three of the five indicated a seasoned pastor, one indicated

¹⁰² Zech, "Best Practices in Parish Internal Financial Controls," 73.

“all of the above,” and the last suggested summer ministerial experiences and pastoral year that are, presumably, seminarian experiences. It should be noted that if some parishes are eventually to become deacon- or lay-led, then formation is still necessary as parish administration is not the same as business or non-profit administration. Finally, mentoring or round table discussions, while very fine suggestions, are not practical as primary training forums. To assign a priest-mentor to provide “ground-up” training is probably not as practical as it once was due to changed demographics: a dearth of vocations and an aging population. Roundtable discussions likely provide the best forums for pastors, both seasoned and novice, to gain and give advice regarding trends and problem issues.

Graph 13: Question #19, Where, in your opinion, is the best place to learn what you wished you knew when you first became a pastor or administrator?

Q19 Where, in your opinion, is the best place to learn what you wished you knew when you first became a pastor or administrator?



Most respondents (63 of 67) answered open-ended Question #20, “In your opinion, what is the hardest or most challenging area of parish administration and why?” Many of these answers could be categorized (see Table 6 below.) Some provided more than one area of challenge. Rules and regulations pertain not only to governmental requirements but also to Diocesan ones. Most, however, related to human resources and many of these comments had tie-ins to leadership. For example:

- “Personnel problems - giving direction where needed and not offending or creating a larger problem(s).”
- “Dealing with various personalities on staff. We’ve had to work a lot lately at team development, unity and a common vision. We asked a business coach for assistance and he’s been a blessing to help bring a greater unity among the staff.”
- “Evaluating which person is needed for each role by understanding new creative ways of distributing workload according to a pastoral plan.”
- “Managing employees.”
- “Personnel” is much broader than just employees. In our context it includes parishioners and volunteers.”

Some answers were all encompassing:

- “Business management.”
- “Working within an outdated system.”
- “Gathering data about parish needs i.e. what parishioner needs are and demographic trends to help prepare for the future.”
- “Balancing administrative responsibilities and pastoral ministry in a way that administration is at the service of ministry.”
- “All categories are mixed together or individually.”

Some responses were quite colorful and others frankly conveyed frustration:

- “Personnel: inherited wrong people for their roles but longevity prevents termination and lack of financial resources prevents hiring additional people with proper skill set to achieve proper mix.”
- “As a pastor, I am responsible for everything. I find it arrogant that I try to be everything to everyone in all matters, administrative and spiritual, all of the time. And, the Church expects this from me. It is too bad that the Church had not planned to increase revenues so that parish budgets could allow for a professional business manager to take over these time consuming matters associated with administration.”
- “Personnel - especially those in support positions e.g. maintenance. When you get a good person, it’s great, but often those less motivated but willing to accept the salary we can offer, present some very problematic situations and take an inordinate amount of time to deal with.”

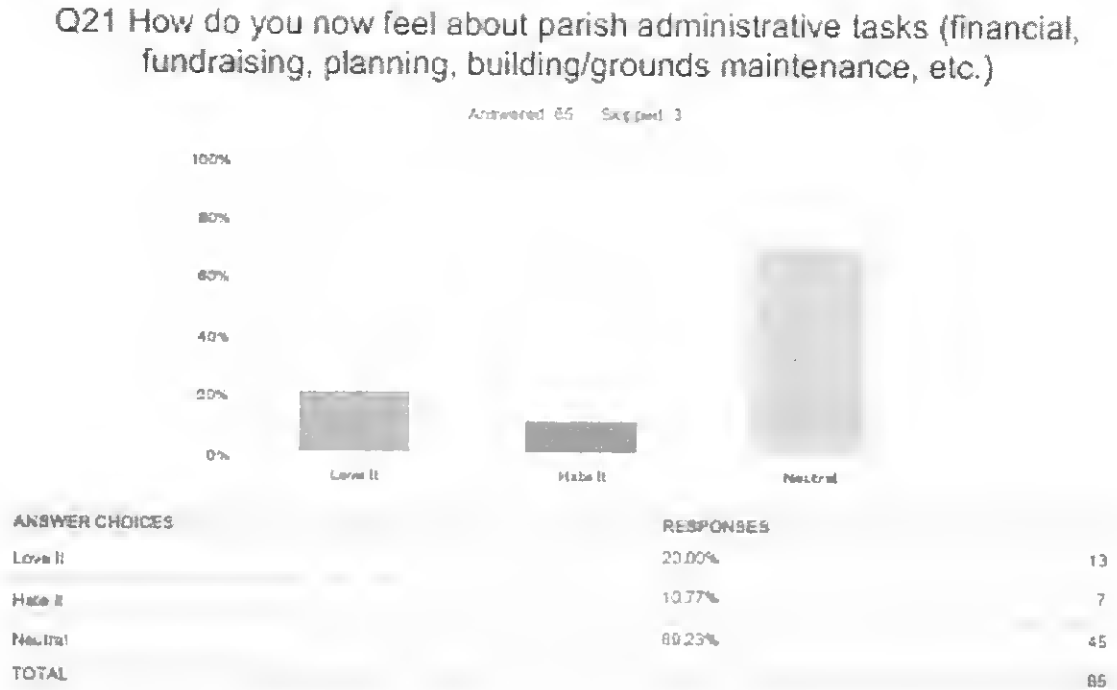
- “New challenges that I have never encountered before.”
- “I know squat about financial forms, and frankly only care to know as much as I absolutely have to.”
- “Right now, evaluating maintenance staff. I need to upgrade their attitude and work habits. Or get rid of them.”
- “Personell (*sic*)- hiring, motivating, evaluating, compensation. All are most important for building a community of service to the parish. I would say I have been lucky rather than good in making these decisions.”
- “It is personal. I am a very sensitive person. I am more of a counselor or a healer. Sometimes you need somebody who is more objective.”
- “Communication to the folks about the realities of what is happening, especially when it is bad news (declining numbers, tough financials, etc.) - yet remain hopeful.”

Table 6: Topical Summary of Open-Ended Answers to Question #20, “In your opinion, what is the hardest or most challenging area of parish administration and why?”

HUMAN RESOURCES	LEADER -SHIP	FUNDRAISING	FINANCE	BUILDINGS / REAL ESTATE	RULES AND REGULATIONS
31	20	8	7	7	5

Question #21 takes the temperature of the attitudes toward administrative work and “tepid” sums it up. Eleven of the 13 that love administrative tasks have a person on staff at the parish that handles, in most cases, some administrative tasks. Five of the 11 have backgrounds (degree or work experience) that would predict familiarity with parish administrative tasks and an easy transition into those responsibilities. Four of the seven that hate administrative tasks have no staffing at the parish to assist with these tasks. Four of the seven spend a considerable amount of time (50-80%) of their time with this work. Most politely reported being neutral.

Graph 14: Question #21, How do you now feel about parish administrative tasks?



Question #22 seeks an answer of the estimated amount of time that a pastor or administrator personally spends with administrative tasks. These tasks are defined to include temporal activities that support ministry to people, such as finance, fundraising, building maintenance, and personnel. Interestingly, the amount of time that a pastor or administrator spends with administrative tasks does not have a correlation to staffing. See Table 7 below Graph 15.

Two responded that they spend more than 80% of their time on administrative tasks. At least one may have included pastoral planning as an administrative task. Both of these pastors employ office managers and one of these managers handles all (not some) administrative tasks. Both reported that issues pertaining to buildings are their most time consuming task. Both reported average annual offertory collections at less

than \$500,000. The number of registered families is less than 500 in one parish and 501-1,000 in the other.

Twelve responded that they spend 50-80% of their time attending to administrative matters. Four of the twelve did not have a person on staff to which these tasks could be delegated. In one case, the parish had registered families numbering 1,001-2,000 with average annual offertory collections of less than \$500,000. The rest of the twelve have staff that handles some administrative tasks. Of these, four pastors delegate to secretaries or bookkeepers. In one case, it was in a parish with average annual offertory collections of \$500,001-\$1,000,000 and over 2,000 registered families. There appears to be a strong correlation between the amount of time that a pastor spends with administrative tasks and the type of staffing. Those that hold titles of “secretary” or “bookkeeper” may not have the training or experience that is robust enough for a leader to delegate complex tasks.

The majority (36) of responders spend 30-50% of their time with administrative matters. Twenty-three employ a person (13 of these hold the title, “Business Manager”) at the parish who handles some administrative matters. Nine had no staffing, including one pastor with over 2,000 registered families and \$500,001 to \$1,000,000 in average annual offertory collections. Four had people that handled all administrative matters and these people all held the title of either “Business Manager” or “Financial Manager.”

Fifteen responded that they spent 10-30% of their time with administration. Four reported having no assistance at the parish. Nine have delegated some administrative work. Five of the 9 employ a person that holds the title, “Business Manager.” Two employ Business Managers that handle all administrative tasks.

Taking the midpoint of the range of all of Question #22's strata and then taking the average, results in an answer of 41.5%. Cleveland's parish pastors or administrators spend an average of 41.5% of their time with administrative tasks. Freeing a pastor or administrator of some or all of this time would certainly diminish the effects of vocational shortages, since, a priest that is freed from administrative tasks would have more time for pastoral work.

Graph 15: Question #22, What percentage of your time, on average, do you now personally spend on administrative tasks?

Q22 What percentage of your time, on average, do you now personally spend on administrative tasks? Do not include the time that others on your staff spend on administrative tasks.

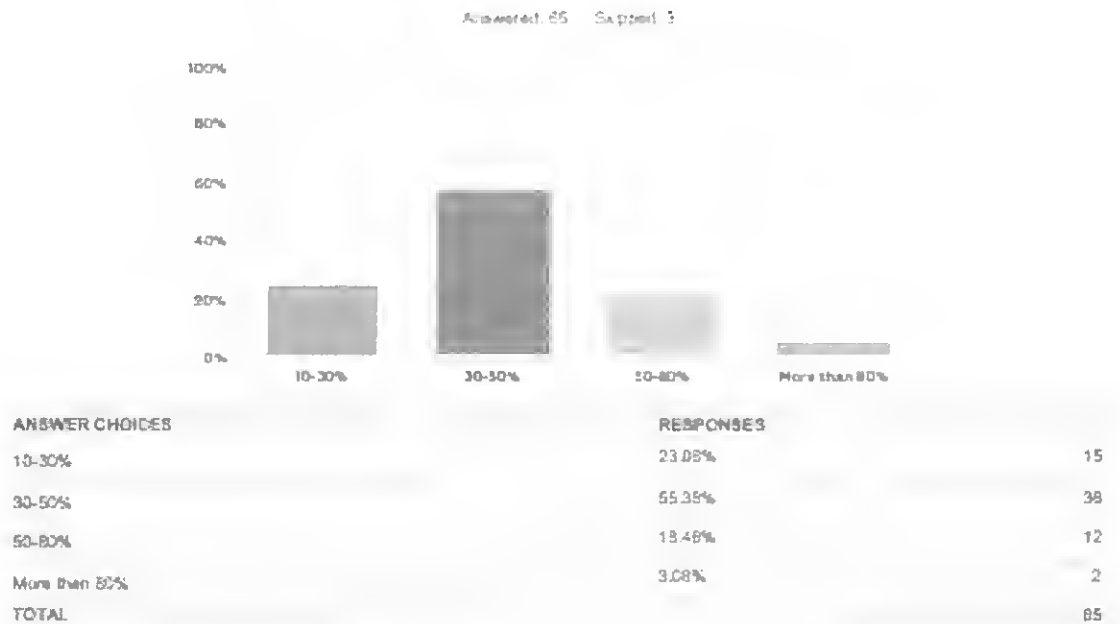


Table 7: Comparison of Time Spent with Administrative Tasks and Parish Staffing

AMOUNT OF TIME SPENT WITH ADMIN.	% WITH STAFF	NO STAFF	STAFF HANDLES SOME ADMIN.	STAFF HANDLES ALL ADMIN.
10-30%	11/15 = 73.3%	4	9	2
30-50%	27/36 = 75.0%	9	23	4
50-80%	8/12 = 66.7%	4	8	0
More than 80%	= 100%		1	1
TOTAL		17	41	7

Salient points of this survey are summarized again in the bullet points below:

- An average annual contribution of \$500 per registered family emerged from a comparative analysis of answers to Questions #1 and #2.
- 60% of responders reported having staff to which some administrative matters are delegated. There was not a correlation for the size of the parish or average annual collections to staffing, except at the level of over 2,000 families and \$1,000,000 collections, respectively. Over 26% reported having no assistance at all.
- Lengthy tenures as parochial vicars, business-related degrees, and relevant work experience are reliable predictors of an easier transition to the administrative responsibilities of a pastor.
- The responses point to a population of priests that is “greying.”
- When they first stepped into their roles as pastors or administrators, most (42%) answered that they felt somewhat prepared. The areas where they felt their skills or knowledge fell short were related to finance and personnel.
- On a scale of 1 to 6, survey responders, as a whole, wished they knew more about personnel followed by financial matters when first named pastor or administrator.
- On a scale of 1 to 6, responders felt that they would benefit most with knowing more about personnel and then technology.
- On a scale of 1 to 6, pastors and administrators responded that their most time consuming tasks related to buildings and real estate and then personnel.
- Most (53%) felt that the best way to learn about parish administration is through post-ordination learning conferences. On-the-job training was preferred by 25% of the respondents.
- Most (69%) answered that they are neutral about administrative tasks when asked how they felt about them.
- In response to an open-ended question, their hardest or most challenging area was, overwhelmingly, personnel. Threaded through these responses were challenges related to leadership: conflict management, motivating employees, and collaboration.
- Most (55%) responded that they spend 30-50% of their time with administrative tasks. The average of the midpoint values of the ranges was 41%.

*The Reluctant Steward: A Report and Commentary on the
Stewardship and Development Study*

Initiated in 1990, Christian Theological Seminary and Saint Meinrad Seminary (Indiana’s two largest seminaries) embarked on a collaborative research project “to study the ways that churches in the United States and Canada prepare their current and future leaders to be better stewards of the human, physical and financial resources entrusted to

their care.”¹⁰³ The results were published in 1992, in *The Reluctant Steward: A Report and Commentary on the Stewardship and Development Study*. The study explored Protestant and Catholic pastors’ and respective seminary leaders’ attitudes toward “finance” and “administration” with an objective of identifying programs currently offered by seminaries in the areas of leadership, management, and stewardship; to survey pastors’ attitudes and perceptions about leadership, management, and stewardship; and to make recommendations on programs and activities that would help prepare people to be good leaders and stewards.

The development of comprehensive surveys, one for pastors and another for seminary leaders, was based on the themes that emerged from the discussions that were held with two focus groups:

- Ordained and lay staff from Protestant and Catholic churches on issues relevant to their ministries and
- Seminary faculty regarding their views with respect to issues facing leaders of parishes or congregations.

These discussions were complemented by a series of interviews with individuals having experience with church-related organizations in the areas of leadership, stewardship, and management and that had knowledge of how church leaders receive pertinent training.

The thoughts that emerged from the focus group discussions and interviews included:

- A church leader is a ‘good steward’ if he or she is committed to the theology and practice of Christian stewardship, has a deep sense of responsibility for the resources entrusted to his or her care, knows that his or her leadership in the church is exercised *on behalf of God as a service to the community*, and either has

¹⁰³ Daniel Conway, project director, *The Reluctant Steward: A Report and Commentary on The Stewardship and Development Study* (Indianapolis and St. Meinrad, IN: Christian Theological Seminary and St. Meinrad School of Theology, 1992), 5.

the needed administrative skills or knows how to identify and recruit people who have them.

- Ordained church leaders are prepared through their seminary curricula. Seminars or training programs and continuing education programs in the areas of administrative leadership and management should be available for the laity and the ordained.
- Education and training programs should be grounded in the theology and practice of Christian stewardship. They should be oriented toward providing church leaders with sufficient knowledge and skill to allow them to exercise responsible oversight for the stewardship and development of church resources. The programs should be easily accessible in terms of affordability, time, and location.
- The question, “What church leaders should know?” should be answered in the context of generally accepted standards of the leadership and management of non-profit organizations and the needs of those actively involved in positions of church leadership.

To test the hypotheses that emerged from these discussions and interviews, a random survey of 200 U. S. Catholic and 200 U. S. Protestant pastors was conducted by telephone and all U. S. and Canadian seminaries that were members of the Association of Theological Schools (ATS) were mailed census forms. One hundred and forty seminaries returned the surveys.

The results of the pastors’ survey indicated that,

Regardless of their religious traditions, the mainline Protestant and Catholic pastors who were surveyed strongly agree that administration and finance are their greatest areas of frustration. At the same time, while they believe that seminaries should do more to prepare those who will come after them for administrative and financial leadership, they do not express any strong interest in continuing education courses or workshops which might help them to be better stewards of their congregations’ human, physical and financial resources.¹⁰⁴

Certainly, administration was not the primary motivator that moved clergy to pursue formation and ordination. This is not unusual as this would be the expected outcome if the same question were posed to lawyers, doctors, dentists, engineers, etc. Most pastors wanted no part of administrative and financial matters, although they willingly

¹⁰⁴ Conway, *The Reluctant Steward*, 15.

acknowledge that they are important to the spiritual health and well being of their congregations. In truth, they wanted to be left alone to exercise their pastoral duties without the distraction of administrative matters. Pastors preferred that their congregations' managerial and financial responsibilities be handled by others. More than 85% of those surveyed indicated dissatisfaction with their training for administrative and financial responsibilities, a demanding part of their lives as pastors. Further, they were not confident of their abilities and skills in these areas. "Nearly 75% said that seminaries should offer more practical courses in leadership, personnel and management."¹⁰⁵

The results of the seminary questionnaire indicated that a majority of seminaries offered courses and other programs in the areas of leadership, stewardship and management but they were rarely a part of the required curriculum.

Although the leaders of Catholic and Protestant seminaries agree that good stewardship is essential to the pastor's calling and that managing money has spiritual significance, two out of five Protestant seminary leaders and three out of four Catholic seminary leaders do not believe that the seminary has a responsibility to teach its students how to administer a local congregation. This does not mean that seminary leaders regard these matters as unimportant. It does mean, however, that they do not perceive them as integral to the mission of theological education.¹⁰⁶

Recommendations were made to the seminaries that sponsored the report and to Lilly Endowment, the financial sponsor:

- Further study the anomaly of the need for better preparation and training to carry out administrative responsibilities while seminaries are not willing or unable to provide this preparation and, further, that pastors are reluctant to participate in training.
- Education classes or training courses that prepare current and future church leaders for administrative and financial duties must begin from a strong Biblical

¹⁰⁵ Conway, *The Reluctant Steward*, 14.

¹⁰⁶ *Ibid.*, 22.

and theological base. They must also be integrated with the pastoral and theological education that seminaries offer.

- “Seminaries, dioceses and judicatories need to address issues regarding leadership, stewardship and the meaning of money as an integral part of Christian life-not as a “necessary evil” or “burden” on individuals or organizations in the Christian community.”¹⁰⁷

The study further proposed that the theology of Christian stewardship be reclaimed from superficial meanings. That is, a euphemism for fundraising or time, talent, and treasure. Stewardship truly is an all-encompassing notion of how to live life. It is a lifestyle that is not optional for Christians. Stewardship “is an integral part of the life of the church which cannot be separated from the theological and pastoral life of our faith communities.”¹⁰⁸

Both Protestant and Catholic pastors have enormous demands placed on them, especially in the management of financial and human resources. The outcomes of the project clearly showed that pastors are reluctant stewards of their respective churches’ resources. The leaders of our churches, however, must be comfortable overseeing the administration of their congregations. In fact, most administrative functions can and should be delegated. “Church leaders who neglect the good order and financial well being of the church because they feel burdened by administration and money do their congregations and their ministries a real disservice.”¹⁰⁹

¹⁰⁷ Ibid., 27.

¹⁰⁸ Conway, *The Reluctant Steward*, 7.

¹⁰⁹ Ibid.

The Reluctant Steward Revisited
Preparing Pastors for Administrative and Financial Duties:
A Report and Commentary on a Study Conducted by Saint Meinrad
School of Theology

As a follow-up to the initial 1992 study, Saint Meinrad Seminary conducted surveys and published the results in 2002 in, *The Reluctant Steward Revisited*. It sought to answer the questions “...have we made any progress in the past ten years in our understanding of the relationship between ministry and administration – or in clarifying the respective roles of seminaries and denominational bodies in the ‘stewardship education’ and ‘leadership formation’ of pastors?”¹¹⁰

As a preliminary step to the crafting of surveys, a series of reflective group discussions with pastors, seminary and church leaders, and students regarding the “money talk” taboo, changing notions regarding church and community and pastors and congregations as “stewards,” and the roles and responsibilities of seminaries and denominational bodies in stewardship education and leadership formation were conducted. The following points emerged from these discussions:

- There is a discomfort among clergy, educators, and congregations with talking about money in a religious context.
- A lack of seminary programs that address faith and financial issues, combined with silent pastors, may convey the message that money is incompatible with Christian ministry and spirituality.
- There is an increasing concern, among both Catholic and Protestant pastors, that notions of what it means to be a part of a church community are eroding. It seems as if the church is becoming a place of paying for particular spiritual services rather than a place of larger mission.
- An authentic theology of stewardship requires a conversion. It must be accepted that stewardship is integral to Christian discipleship and is, accordingly, not optional for individuals or churches.
- Pastors need to move from a “management” to a “mission” mindset. That is, tasks such as passively maintaining buildings and institutions need to be re-

¹¹⁰ Conway, *The Reluctant Steward Revisited*, 7.

prioritized in favor of projects where benefits of the support can be seen and felt, such as those with “human faces.”

- A joint approach that offers some training in the seminary and then later through continuing education may be the best educational model.
- Mentoring or roundtable discussions were recommended as profitable networking and learning opportunities.
- Nearly all agreed that little practical knowledge is successfully taught in a seminary course.
- Skills should not be learned through trial and error.

The hypotheses gleaned from these discussions were tested via telephone surveys of 403 Protestant and Catholic pastors located in the U.S. and in a separate written questionnaire of all 243 accredited theological schools in the U.S. and Canada. Of the questionnaires returned, 101 questionnaires were usable.

The results of the pastors’ survey indicated, among other points, that a theology of stewardship, along with its practical implications, needs to be integrated into seminary education. Many were of the opinion that seminaries and dioceses need to do a better job of training students for parish administration. It was suggested that a combination of seminary and post-seminary administrative and financial courses would be most beneficial. In addition, opportunities to be paired with seasoned pastors for mentoring would have been welcomed. The majority of pastors were not interested in attending educational programs that deal with the administrative aspects of pastoral ministry.

The outcome of the seminary survey indicated that there remains uncertainty as to what their role should be in helping pastors acquire the skills that are essential for successful pastoral leadership. It was affirmed that the concept of stewardship is an important element in understanding the mission of the church. Some seminaries have added a required course to the curriculum to address practical skill needs that is taught by an active pastor.

This follow up study also produced recommendations. Daniel Conway noted that,

In spite of their ambivalence, I think that seminaries need to take the lead (with encouragement and support from denominational bodies) in developing academic and extracurricular programs that can address the full range of knowledge and skills needed to be successful in pastoral ministry today. Anything less than this is an abdication of the school of theology's proper role in educating ministers for the church.¹¹¹

Overall, however, stewardship education and leadership development needs to be the collaborative effort of seminaries, denominational bodies (dioceses), and experienced pastors. The ultimate goal of these efforts is to help pastors become confident, and not reluctant, stewards.

In comparing the outcome of my survey with those of the *Reluctant Steward* studies, I did not notice significant differences. It is duly noted, however, that the *Reluctant Steward* studies were much more comprehensive and the scope of their work was wider with different categories of questions, including the measurement of subjectives, such as attitudes towards money and the achievement of “balance” of the various dimensions of pastoral ministry, and a broader range of administrative topics to weigh in on, including “handling diversity” and “public relations skills.” The similarities that I noted where categories and opinions overlapped with the outcomes of my survey are as follows:

- New pastors generally did not feel completely prepared to take on parish administrative responsibilities.
- Most pastors do not love the work of administration.
- Administrative functions are time consuming and a source of frustration.
- Training is needed but the seminary may not be the best place for this.
- A joint educational approach may be optimal for preparing priests to be pastors or administrators. This would include seminary courses, continuing education conferences, and mentoring by seasoned pastors.
- “Trial and error” learning methodologies are not recommended.

¹¹¹ Conway, *The Reluctant Steward Revisited*, 34.

There were also differences:

- *Reluctant Steward* pastors felt least prepared to assume responsibilities associated with raising and managing money (similar to the pastors' answers to my survey) with little mention of personnel issues related to church staffs, volunteers, and parishioners/congregants (different than the outcome to my survey.)
- *Reluctant Steward Revisited* recommended that seminaries take the lead in training priests to be pastors with the development of academic and extra-curricular courses. This statement assumes, perhaps, that denominational bodies (dioceses) do not have offices responsible for continuing education of ordained personnel. Only 14% of the pastors that responded to my survey were of the opinion that the seminary was the best place for administrative education. (It was interesting to note, however, that the *Reluctant Steward Revisited* survey's Graph G did not include a post-ordination training option for church administration. It only provided options for required courses in the seminary curriculum. Including such an option could have led to a different outcome. Further, Graphs K and L in *Reluctant Steward Revisited* chart the answers to what appears to be two separate questions rather than a single, comparative question regarding where or when practical administrative training is optimal: pre- or post-ordination.)

Chapter Five

Pastoral Reflections and Recommendations

Overview

The table has been set and my words have been served up for me to eat as my survey outcomes were not entirely what I expected and will not neatly dovetail with my original project proposal as described in Chapter I which are learning materials that introduce or hone administrative skills for an intended audience having little to no business background toward an outcome of a more efficient use of talent, resources, and time. My intention was to implement this within the context of a seminary class and for the students to evaluate the materials' effectiveness.

The idea of 15-minute training modules or *PowerPoint* presentations simply does not cut it as they are insufficient for the need at hand. Based on my survey outcomes, the most pressing need from the viewpoint of Cleveland's pastors, overall, is the resources and tools for managing personnel. Human resource topics tend to be subjective, not objective, and are thus not entirely conducive to *PowerPoint* slides. In addition, it is beyond my scope and depth of expertise. Rather than working to implement, I will instead seek to humbly and politely offer recommendations.

This final chapter will return the reader to the first chapter of this body of work in order to summarize the foundation and framework of this project and its viability (practicality) based on probes and benchmarks. I will bring this chapter to a close with a series of proposals based on the outcomes of the survey that I conducted with the goal of promoting efficient parish administration in order to enhance and promote the mission of

the Church. In short, our clergy should be freed of the details of parish administration in order to spend more time with their flocks.

Project Foundation and Framework

The functions of leadership and administration, held together in this project, are rooted in, and genuine expressions of, Sacred Scripture and the Tradition of the Catholic Church. At the foundation of this project is Scripture and the framework of Tradition is built on top of it. Lessons of leadership and administration are found throughout the Bible:

- Genesis 1:1-2:3. God brings order out of chaos. The cosmos is brought forth in a logical, symmetrical, and thoughtful manner. This is the first work and a prototype for all that follows.
- Genesis 1:28-30, 2:15. Men and women are God's agents and have fiduciary responsibilities. The biblical notion of dominion is to secure the well being of every creature and to bring the promise of each to full fruition.
- Exodus 3:9-15, 4:1-17. Moses, one of the world's first great leaders, grows into his role as a collaborative shepherd throughout the story of Exodus. He understood the mission, embraced it as his own, and dedicated himself to its fulfillment even though he did not anticipate or desire his own role in it.
- Proverbs 29:18. Vision motivates! Its effect is to move leaders to inspire others to undertake the same mission and to inspire the next generation of leaders.
- 1 Corinthians 12:27-31a. St. Paul lists administration as a charism. Properly exercised, it is an activity that transforms the life of administrators and others.
- Romans 12:3-8. Gifts with which one is endowed may not be ignored and should be exercised with passion and enthusiasm.
- Luke 22:25-27. Jesus said to his disciples, "I am among you as one who serves." Service constitutes authentic power.
- Matthew 18:21-35. In the Parable of the Unforgiving Servant, the first servant exhibits a lack of emotional intelligence (self-awareness, self-control, and empathy) that is a hallmark of leaders.
- Matthew 20:1-16. The Parable of the Laborers in the Vineyard offers lessons for leaders and workers: the ability to defuse tension and transform others and to re-orient from a focus on the self to that of the common good.
- Luke 6:43-45. Character precedes action. Those that persist in the practice of virtue will have mastered themselves.
- Luke 16:1-8, 10. Failure can be a learning laboratory. Mistakes are the occupational hazards of leadership.

- Matthew 25:14-30. In the Parable of the Talents, the master's leadership style is characterized by observation, trust, and justice. The servants are called to work with integrity, diligence, and fidelity. Successful handling of lesser responsibility will merit greater responsibility.

In sum, administration and leadership are charisms having a divine origin and may not be denied. They have no priority over other callings and vice-versa. Every vocation has equal weight, relevance, and importance within the Lord's plan.

The framework of this project is built with the current teachings of the Church and recent literature pertaining to leadership and Church administration.

- The extraordinary documents produced by Vatican II, together, call all of the baptized to participate and share in the divine life. All are called to holiness and mission. In a particular way, *Lumen Gentium* and *Apostolicam Actuositatem* called the laity to the direct participation in the mission of the Church at the parish and diocesan levels. Even more remarkable, *Christus Dominus* calls for lay participation at the level of the Roman Curia.
- The Code of Canon Law echoes the Vatican II documents, recognizing that lay people are a gift to the Church in terms of talent and service.
- The Code addresses the administration of the Church's property in very particular ways in canons 1284, 1286, and 1287.
- Administration is a dimension of stewardship and, therefore, a category of Catholic social teaching.
- Stewardship is not a euphemism for "time, talent, and treasure," but an all-encompassing way of life.
- The topic of administration is trending within Church circles, catalyzed by constrained resources and financial irregularities.
- The body of literature (books and articles) pertaining to Church administration is grounded in the notion that good management is essential to mission and, therefore, a crucial ministry in the Church. It is organized around the idea that the business and non-profit sectors have much to offer the Church in terms of "best practices."
- Leadership is essential and foundational to good administration.

Amid excellent models of Church management are situations of egregious administrative landscapes that have been brought to light by scandal and bankruptcy.

The Church deserves to be managed with the highest level of care, ethics, and accountability. The time for action is now. Pastors need to be equipped with the

knowledge to capably oversee the administration of a parish. Further, pastors must be able to delegate the day-to-day work of administration to those called and trained to do so.

Project Probes and Benchmarks

“Probes” and “benchmarks” are borrowed from the business world. A “probe” is an exploratory survey having the goal of a project’s viability. In short, does it make sense in terms of interest or need? “Benchmarks,” or comparisons are used to anticipate and gauge the quality of a given outcome, such as that of a project when it has been implemented or, in this case, a survey’s outcome.

The probe of the local community was conveniently conducted, ahead of the beginning of my project, by Sherri Moyer who had done this work for a class that was to have been offered during the Spring, 2017 semester at the Seminary. The “wish list” that was developed from her conversations with 14 priests, pastors, and lay people included financial statement literacy, personnel management tools, and leadership development. My own informal dialogues with people that have contact with, or that have worked in, church offices revealed unflattering portraits of clergy that lack emotional control and maturity, parish staff with mediocre skills or who lack the motivation to learn, and offices plagued by negativity and gossip. Pastors have shared that they spend a lot of time with administrative matters. In some cases the amount of time spent was, in my opinion, surprisingly excessive. These probes indicate the need for skill set enhancement.

The benchmark employed was the literature, books and articles, read for this project. Nothing brought forth in my survey was inconsistent with the data in the body of current literature that was read in conjunction with this project and presented within

Chapter Two of this document. Most significant of these is the data gleaned in the studies conducted and reported in *The Reluctant Steward* in 1992 and *Reluctant Steward Revisited* in 2002:

- Pastors have enormous demands placed on them, especially in the management of financial and human resources.
- Most pastors wanted no part of administrative and financial matters.
- Most expressed dissatisfaction with their preparation for the administrative and financial responsibilities as pastors of parishes or congregations.
- Most seminaries did not have courses or programs in the areas of leadership, stewardship, and management as a part of the required curriculum.

The outcomes of this national survey have parallels in the parishes of Cleveland.

Survey Outcomes

The survey captured the attitudes and opinions of a segment of Cleveland's pastors and administrators that, given the response rate, probably reflected those of the population as a whole. The survey's data conveyed a sense of frustration with inadequate skill sets, challenges with staff, volunteers, and parishioners (personnel), workload, and finances:

- 26% of responders reported having no assistance with administrative matters.
- 23% reported not feeling prepared to undertake the administration of a parish and 42% reported feeling somewhat prepared.
- When first named pastor, most wished they knew more about personnel matters.
- Most feel that they would benefit most, at the present time, knowing more about personnel.
- The most time consuming tasks are those related to building and real estate followed by personnel.
- 53% are of the opinion that post-ordination learning is the best way to learn about a pastor's administrative responsibilities.
- 69% reported feeling neutral about administrative tasks. 11% hated them.
- Responses to open-ended questions related to personnel but also indicated leadership challenges, including conflict management, motivating employees, and collaboration.
- On average, pastors and administrators spent just over 40% of their time with administration.
- The population of priests is "greying."

- Average annual per-family contribution is about \$500.

In short, there is room for change and improvement.

Rationale for Change and Improvement

To be efficient is to produce a desired outcome (change, result, or product) with a minimum of effort, expense, or waste. In a context of shrinking or unpredictable pools of resources, efficiency becomes necessary and not just desirable. Those from the world of business would be charged with “doing more with less.” Within this operating environment, leaders will seek to leverage core competencies to the betterment of an organization, often saving money in the process. For example, it is not efficient (or cost effective) for a priest to do the work of a clerk or accountant. Although couched in the vocabulary of the business world, in sum, this is stewardship at work.

In 2014, *The Washington Post* published an article about Catholic seminarians going to “summer school” at Villanova University to learn management skills. Only one of the 10 seminarians had seen a parish budget before stepping into the classroom. The hoped for outcome of the program is to train the men “to use good management practices to help them operate a parish more efficiently, giving them more time to be the spiritual leaders they were called to be.”¹¹² Another desired outcome is to equip men to recognize what needs to be done and to find the right people to do the work. It was noted that the top reason that priests of the Archdiocese of Philadelphia sought new parish assignments was to get out from under a heavy administrative burden. In 2015, *The Wall Street*

¹¹² David Gibson, “Not just theology: Catholic seminarians go to summer school to learn management skills” *The Washington Post*, July 7, 2014, https://www.washingtonpost.com/national/religion/not-just-theology-catholic-seminarians-go-to-summer-school-to-learn-management-skills/2014/07/07/58dfd33e-05fc-11e4-a7ef-9ed5d8510e81_story.html (accessed January 3, 2016), 3.

Journal reported that the Archdiocese of New York launched an online program, in conjunction with Villanova University, to formally train lay people in church management. Cardinal Dolan hopes to free his clergy to do more pastoral work rather than, "...replacing boilers and leaky roofs in 150-year old parishes..."¹¹³ The rationale for taking similar action in Cleveland is not unlike other dioceses':

- Priests' core competency is ministry to people, which takes time and proximity, and not to organizations. Their time should be freed, as much as possible, of administrative matters to do what they do best.
- Priests are the pastors and administrators of Cleveland's parishes. Their training must be sufficient to ensure capable and confident oversight. Expertise is not required. Our churches deserve to be managed with the highest level of care, ethics, and accountability.
- The administration of Cleveland's parishes is becoming increasingly complex.
- There is a shortage of priestly vocations. Administrative matters must be delegated to capable lay people. If priests' time spent with administration is reduced, then the vocational shortage is also partially abated.
- Staff our parishes with lay people that have the skill set, work ethic, and temperament to whom administrative work may be delegated in whole and not just in part. This may include volunteers, such as retired professionals as well as paid personnel. Smaller parishes may wish to collaborate by "sharing" people.
- Form the people of our parishes in terms of mission, community, and stewardship. An average \$10 weekly contribution is simply not appropriate.

Proposals

Executive Summary

The goals of my recommendations are to free the Church's ministers for pastoral ministry, to provide administrative training sufficient for capable and confident oversight, and to encourage that the details of administration be delegated to those having appropriate skill sets. Toward these ends, the formation of leaders and the development of administrative training programs are essential. Leaders are not born and leadership is

¹¹³ Melanie Grayce West, "N.Y. Archdiocese Unveils Church-Management Program," *The Wall Street Journal*, March 10, 2015, <http://www.wsj.com/articles/n-y-archdiocese-unveils-church-management-program-1426007722> (accessed August 10, 2015), 2.

not a gift bestowed at birth. Leadership develops over time, coming from the “inside” and the “outside.” It begins with the self and the acceptance of responsibility. An inspirational leader’s primal task is emotional leadership. Moods are contagious and moods matter because they impact an entire organization. Further, different situations require different leadership styles and they should be studied. The following are offered for further consideration:

- Daniel Goleman’s Theory of Emotional Intelligence and Richard Boyatzis’ Intentional Change Theory for the development of leaders.
- Servant leadership as a style of leadership that may be appropriate within our context of Church.

Administrative training should begin with seminarians and continue through the level of “seasoned pastor.” The following are suggested strategies:

- Expect basic financial literacy of Borromeo’s seminarians.
- An understanding, at a high level, of what parish administration entails at the level of St. Mary’s Seminary.
- Post-ordination training or degree programs for priests called to be pastors or administrators. These should offer more in-depth training of administrative matters, including leadership, human resources, finances, civil law, etc.
- Encourage pastors to collaborate with, and learn from, their peers through the forums of meetings that include discussions of parish administrative best practices, akin to *The Pastor’s Toolbox*.

Administrative practices and procedures should be delegated, automated, and centralized to promote efficiency. In particular, non-core competencies should be delegated to the laity. Trust that the laity will bring the best skill sets to the tasks at hand.

Leadership

Before the work of administrative training begins, proper leadership must be embraced as foundational. It is the key to the success of any and every endeavor, be it personal, professional, or organizational. Leadership must be identified and formed first. The Parable of the Talents, in particular, offers lessons on leadership and being led. The

master is observant, trusting, empowering, has expectations, and is just. Each servant has ability or capacity and the master seeks to unlock the potential of his servants by delegating responsibility. He then holds each of his servants accountable.

Styles of leadership should be named and examples studied. I would suggest that the overall style of leadership most appropriate to the context of the Church is one that is called, “servant leadership.” Essentially, a servant leader is a servant first, whose first inclination is to serve. Chris Lowney offers four “pillars” of leadership success in his book *Heroic Leadership*: self-awareness, ingenuity, love, and heroism. I have read multiple authors’ works related to leadership within the context of this project and many converge on this style of leadership whose authority is defined by how leaders author life. Leadership is defined by the quality of a person’s response to a given circumstance and not by the size of their platform of influence or scale of opportunity. This would include our moms and the rest of us. All leadership begins with the leadership of self. Leaders unequivocally set the tone of the organizations that they lead.

- Habits take time to change and to form. Thus, the work of leadership formation should begin at Borromeo Seminary and continue at St. Mary Seminary and be an ongoing process of learning and guiding others through post-ordination continuing education and the mentoring of recently ordained priests and parish staffs.
- Explore and understand the notion of emotional intelligence. Mood is contagious! Toxic moods and upsetting behaviors wreak havoc on groups and organizations. Case Western Reserve University offers a very fine online course, “Inspiring Leadership through Emotional Intelligence.” It is available online through *Coursera*. I personally found it to be transformative.
- The acquisition and development of emotional intelligence competencies that are grouped into the categories of self-awareness, self-management, motivation, empathy, social awareness, and relationship management. 360-degree feedback programs, while expensive, are helpful in this regard. Mentors may be a critical component of successful personal change for those that desire and are committed to change.

- Study leadership and leadership styles. A particular emphasis may be placed on servant leadership. Within Cleveland there are many wonderful examples among the ordained.
- Reading lists should include leadership titles. My own favorite is Chris Lowney's *Heroic Leadership: Best Practices from a 450-Year Old Company that Changed the World*. *Primal Leadership: Realizing the Power of Emotional Intelligence* by Daniel Goleman, Richard Boyatzis, and Annie McKee is also excellent.
- Executive Education programs are available through Case Western Reserve University. Richard Boyatzis is a Professor at CWRU.
- Leadership practicums are important, especially for seminarians. This includes even the most ordinary tasks, such as organizing lunches or coordinating fundraisers.

Administration

Personal financial literacy and an introduction to parish administration are appropriate as a part of the Seminaries' curricula while a comprehensive program is more appropriate as a post-ordination continuing education program. Pastors and administrators should be committed to a lifetime of personal, spiritual, and professional development that includes administration. Their goal is to maintain their edge with respect to oversight. Their purview should not be attending to details but to governance instead. These tasks should be delegated to those with the appropriate competencies. My research has produced the list below. I am entirely certain that it is not comprehensive and that there are other resources and needs that I did not detail.

- Financial literacy should not be assumed. Seminarians should be coached toward basic financial literacy, including balancing a checkbook, how one goes about buying or leasing a car, etc.
- St. Mary's Seminary offers an introductory course, PAS 551, Pastoral Administration to seminarians in their final year of formation and education. This is an excellent way of introducing parish administration topics to those preparing for ordination.
- As priests are called upon to lead parishes as pastors or administrators, then a more comprehensive program of training is entirely appropriate and should perhaps be a requirement for the job. Besides leadership (emotional intelligence), the short list of topics includes finances (fundraising, budgeting, investment, and cost savings), human resource skills (clergy, religious, employees, and volunteers), assets (property, buildings, furnishings, and equipment), liabilities

(risk management, internal controls, insurance, and bank loans), and image (marketing, public relations, and social media). The longer list would have canon and civil law, governmental compliance, planning, time management, and stewardship.

- There are degree programs offered by learning institutions. Doubtless there are others than those listed below.
 - John Carroll University offers a Nonprofit Administration program in their Graduate Studies program. The YouTube video embedded in the website features Fr. H. Paul Kim of South Korea!
 - Villanova University offers a Master of Science in Church Management.
 - The University of Dallas offers a Master's in Pastoral Ministry with a Church Management Concentration.
- There are also training programs. Among others, there are the following:
 - The "Toolbox for Pastoral Management" program offered by Leadership Roundtable for new Catholic pastors.
 - The Catholic University of America's Management as Ministry Workshop offers a series of lectures designed to deliver foundational understanding of business best practices. It is targeted to seminarians and newly ordained priests.
- Roundtable discussions with fellow pastors/administrators about administrative best practices within the context of regional meetings should be a norm.
- Reading lists should include titles about parish administration. *A Pastor's Toolbox* and *A Pastor's Toolbox 2* are very good resources and anything written by Charles E. Zech is excellent.
- Pastors should ensure that staffing is appropriate to the size and complexity of the parish's physical plant and ministries. The ability to delegate administrative tasks to competent employees is critical in terms of efficiency and for ministry.
- Staff should be held accountable through job descriptions and annual reviews that include goals for the upcoming year. Consideration should be given to a retirement policy. There should be no such thing as making do with an inherited staff that has significant tenure at the parish but is not up to the work at hand.
- Financial accountability and transparency are foundational to parish ministry. Lack of professionalism, malfeasance, and irregularities will not attract the financial support of the laity. There is competition for charitable dollars!
- Automation of manual tasks. This includes the installation and implementation of software specifically designed for churches, like *ACS*, *Quickbooks*, and *ParishSOFT*.
- Centralization of certain tasks and procedures at the diocesan level. Payroll and human resource support are but a few examples. Accounts payable could lead to purchasing discounts and ensure that applicable sales tax exemptions are obtained.
- Establishment of administrative standards (ethics and accountability codes) for parish staff, volunteers, and council members. Templates for dioceses and parishes are available from Leadership Roundtable.
- It is eminently sensible to share staffing with other parishes.

The final word is that the parish staff as a whole sets the personality of the entire parish. Members of the staff are the first face of the parish for those that come to visit. They are also the reason why people stay and become involved.

Implementation

In terms of implementation, Pope Francis has set a gold standard at the level of the Holy See as reported by *Fortune* in a 2014 article titled, “This Pope means business.” The article praised the Pope’s elite managerial skills. “Like a great CEO, he has the ability to set a strategic vision, then choose and motivate the right people to make it work. His rapid overhaul of the Vatican’s finances is both one of the most unusual case studies in the annals of business and one of the most instructive.”¹¹⁴ The vision that he articulated was that sound financial management was a pillar to giving aid to the poor and underprivileged, one of his most important missions. Knowing that finances were not a core competency of the clergy, he worked to replace cardinals and bishops with lay experts who are “...largely setting strategy, heading regulatory oversight, and running day-to-day operations.”¹¹⁵ The Pope brought in some of the most highly respected consulting firms in the world of business to assist with change: KPMG to implement accounting standards, EY to review the management of the Vatican’s utilities and stores, Deloitte & Touche audits the bank’s accounts, and McKinsey & Co. to assist with the restructuring of media operations. Pope Francis’ style and wisdom is worth emulating.

Some of the varied proposals that I offered above may be implemented at the diocesan, regional, or parish levels. Some may only be deployed at one level and not

¹¹⁴ Shawn Tully, “This pope means business,” *Fortune*, August 14, 2014, <http://fortune.com/2014/08/14/this-pope-means-business/> (accessed July 25, 2015), 5.

¹¹⁵ *Ibid.*

another, like seminary training. When asked to propose a change with respect to the training of Jesuits, Fr. James Martin, a graduate of the Wharton School of Business and former employee of GE Capital, suggested and cautioned, “Drop a year of philosophy and add a year of business. When you think of the likelihood that a Jesuit will one day be running a parish or school, Adam Smith is more important than Immanuel Kant....Anyone running a business who does not know what a bank rec is shouldn’t be (*sic*) running a business. This is not simply good management but good stewardship.”¹¹⁶

At any organizational level of implementation it is good to set a vision while at the same time understanding where the organization is, much like applying the principles of emotional intelligence (self-awareness and self-management) to an individual. At that point, it is good to engage the services of competent organizations, consultants, or individuals much as a mentoring process is done at the individual level. The final step, in this very simplistic overview, is to establish processes and procedures with appropriately trained personnel to give oversight and support.

Amen.

¹¹⁶ James Martin, SJ, “Why the Church Needs Business,” *America: The National Catholic Weekly*, December 19, 2013, <http://americamagazine.org/content/all-things/why-church-needs-business> (accessed September 3, 2015), 3.

Appendix A

Parish Administration in the Catholic Diocese of Cleveland

Introduction

Dear Parish Pastor or Administrator:

I am Marie Kushner and enrolled in the Doctor of Ministry program at the Center for Pastoral Leadership. Some of you may remember me from the classrooms of the CPL and others may know my husband, Deacon David, who is the diocese's Director of the Diaconate Formation Program and who also serves at St. Mary's in Cleveland.

The title of my thesis is, "Toward a Theology of Efficiency: Administrative Practices and Procedures in the Parishes of the Diocese of Cleveland." Fr. John Chlebo is my advisor and Frs. Mark Latcovich and Tom Dragga are my readers. My goal, based on the outcome of the survey, is the development of learning materials that introduce or hone skills related to the efficient administration of a parish in order to make the best use of competencies, resources, and time for the betterment of a parish (and wider) community through the promotion of the mission of the Church.

Through this short and anonymous (you will not be identified by name or parish) survey of all diocesan parish leaders, I am seeking to learn about the amount of time that our parish leaders personally spend on administrative matters or tasks and to identify knowledge gaps in order to develop topical learning tools such as, "How to Read a Financial Statement," "How to Keep Data Secure," etc. This survey has been developed by me and approved by the Seminary's faculty.

I am defining "administrative matters" to include temporal activities that essentially support ministry to the people of our parishes. Examples include maintenance of buildings and properties (cleaning, repairing, landscaping, etc.), bookkeeping, banking, fundraising (weekly collections, special projects, grant writing, etc.), personnel (hiring, appraisals, etc.), meetings (parish and finance councils, etc.), and paying bills. Note that this list is not exhaustive!

I hope that you will indulge me and complete this survey. It should take you no more than 15 minutes to answer several questions that are mostly multiple choice. Again, you and your parish will remain anonymous.

Thank you in advance for your time and kindness. God bless you and your ministry!

Marie Kushner

Parish Administration in the Catholic Diocese of Cleveland

Directions

Please answer all of the questions. They are arranged in three categories: your parish's demographics, your background, and parish administration.

If you are a pastor or administrator of more than one parish, please answer these questions for your first parish assignment and not both parish assignments together.

There are several questions that request rankings from 1 through 6. Note that a number may only be used once!

Thank you very much.

Parish Administration in the Catholic Diocese of Cleveland

Your parish's demographics

1. How many registered families are in your parish?

- ☐ Less than 500
- ☐ 501-1,000
- ☐ 1,001-2,000
- ☐ Over 2,000

2. What is your average ANNUAL offertory collection total?

- ☐ Less than \$500,000
- ☐ \$500,001-\$1,000,000
- ☐ \$1,000,001-\$1,500,000
- ☐ \$1,500,001-\$2,000,000
- ☐ Over \$2,000,000

3. Is there a person at your parish, other than yourself, who is responsible for some or all administrative matters?

- ☐ Yes, the person is responsible for ALL administrative matters
- ☐ Yes, the person is responsible for SOME administrative matters
- ☐ No

4. If you answered "yes" to question #3, what is the title of the person that is responsible for some or all administrative matters at your parish?

Parish Administration in the Catholic Diocese of Cleveland

Your background

5. Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.

- ☐ Not applicable
- ☐ Bachelor's degree
- ☐ Graduate degree (MBA, etc.)
- ☐ Professional degree (JD, MD, DMD, etc.)

6. If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.

7. If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.

8. What is your position at the parish?

- ☐ Pastor
- ☐ Administrator
- ☐ Other (please specify)

9. How many years have you been a pastor or administrator? Include the time that you served as pastor or administrator of another parish or parishes.

- ☐ 1-6
- ☐ 7-12
- ☐ 13 or more

10. How many years have you been at your current parish?

- ☐ 1-6
- ☐ 7-12
- ☐ 13 or more

11. What is your age?

- ☐ 25-35
- ☐ 36-46
- ☐ 47-56
- ☐ 57-66
- ☐ Older than 67

12. How many years have you been ordained?

- ☐ 5 or less
- ☐ 6-15
- ☐ 16-25
- ☐ 26 or more

Parish Administration in the Catholic Diocese of Cleveland

Parish administration

13. When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?

- ☐ Yes
- ☐ No
- ☐ Somewhat

14. If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?

15. Given what you now know, what did you wish you knew when you first became a pastor or administrator? 1 being most important and 6 being least important? Note that a number may only be used once.

- Financial (budgets, statements, investments, etc.)
- Personnel (hiring, evaluating, coaching, dismissal, etc.)
- Fundraising (offertory collections, special projects, etc.)
- Internal controls (theft/embezzlement prevention, etc.)
- Buildings and real estate (maintenance, insurance, etc.)
- Technology (websites, social media, data security, etc.)

16. In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.

- Financial (budgets, statements, investments, etc.)
- Personnel (hiring, evaluating, coaching, dismissal, etc.)
- Fundraising (offertory collections, special projects, etc.)
- Internal controls (theft/embezzlement prevention, etc.)
- Buildings and real estate (maintenance, insurance, etc.)
- Technology (websites, social media, data security, etc.)

17. Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.

18. On average, what is your most time consuming administrative task? 1 being most time consuming and 6 being least time consuming? Note that a number may only be used once.

- Financial (budgets, statements, investments, etc.)
- Personnel (hiring, evaluating, coaching, dismissal, etc.)
- Fundraising (offertory collections, special projects, etc.)
- Internal controls (theft/embezzlement prevention, etc.)
- Buildings and real estate (maintenance, insurance, etc.)
- Technology (websites, social media, data security, etc.)

19. Where, in your opinion, is the best place to learn what you wished you knew when you first became a pastor or administrator?

- ☐ Seminary
- ☐ Post-ordination learning conference
- ☐ On the job
- ☐ Other (please specify)

20. In your opinion, what is the hardest or most challenging area of parish administration and why? Please be specific with your comments.

21. How do you now feel about parish administrative tasks (financial, fundraising, planning, building/grounds maintenance, etc.)

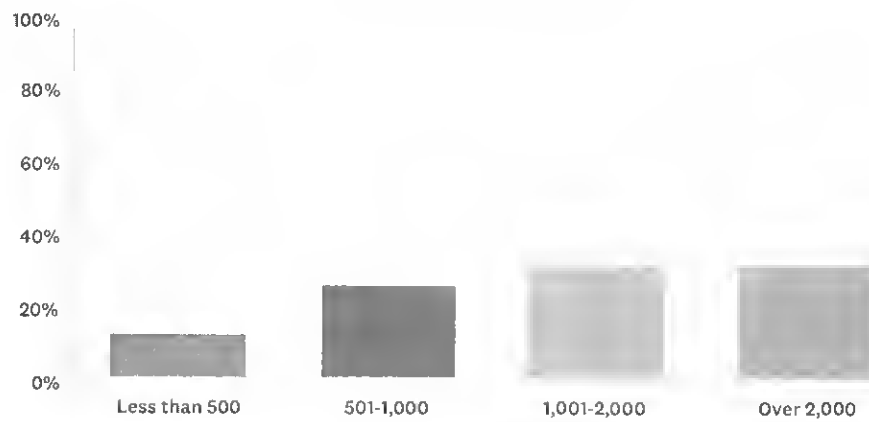
- ☐ Love it
- ☐ Hate it
- ☐ Neutral

22. What percentage of your time, on average, do you now personally spend on administrative tasks? Do not include the time that others on your staff spend on administrative tasks.

- ☐ 10-30%
- ☐ 30-50%
- ☐ 50-80%
- ☐ More than 80%

Q1 How many registered families are in your parish?

Answered: 67 Skipped: 1



ANSWER CHOICES

Less than 500

501-1,000

1,001-2,000

Over 2,000

TOTAL

RESPONSES

11.94%

25.37%

31.34%

31.34%

8

17

21

21

67

Q2 What is your average ANNUAL offertory collection total?

Answered: 67 Skipped: 1



ANSWER CHOICES

Less than \$500,000
\$500,001-\$1,000,000
\$1,000,001-\$1,500,000
\$1,500,001-\$2,000,000
Over \$2,000,000

RESPONSES

41.79%	28
34.33%	23
14.93%	10
5.97%	4
2.99%	2
TOTAL	67

Q3 Is there a person at your parish, other than yourself, who is responsible for some or all administrative matters?

Answered: 67 Skipped: 1



ANSWER CHOICES

Yes, the person is responsible for ALL administrative matters

Yes, the person is responsible for SOME administrative matters

No

TOTAL

RESPONSES

23.88% 16

61.19% 41

14.93% 10

67

Q4 If you answered "yes" to question #3, what is the title of the person that is responsible for some or all administrative matters at your parish?

Answered: 58 Skipped: 10

Parish Administration in the Catholic Diocese of Cleveland

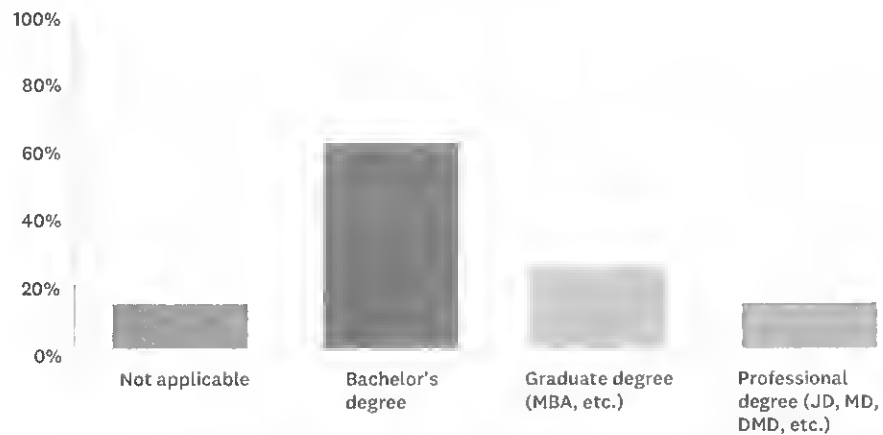
Question #4

If you answered "yes" to question #3, what is the title of the person that is responsible for some or all administrative matters at your parish?

accountant
Administrative Assistant
Administrative Assistant
Administrative Assistant
Bookkeeper
Bookkeeper
Business and Properties Manager
Business Manager
business manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager
Business Manager & Receptionist
Business Manager AND Maintenance Manager (2 People)
Business Mgr. (Finances/Personnel). Also Facilities Mgr.
Business mgr...also another treasurer
Director of maintenance and grounds
Finance Manager
Financial Administrator
Financial Assistant & Business Manager
financial-institutional mannager
I've got both an Office Manager and a Business Manager
office manager
Office Manager
Office Manager
Office Manager
Office Manager and Building and Grounds Manager(2 people)
Office Manager, Bookkeeper
Parish Administrative Assistant
Pastor
Pastor
Pastor
Pastor
Pastor
Pastor
pastor
Pastoral Associate
Pastoral associate
Principal
Secretary
Stephanie Kowalczyk
The Pastor

Q5 Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.

Answered: 66 Skipped: 2



ANSWER CHOICES

Not applicable

Bachelor's degree

Graduate degree (MBA, etc.)

Professional degree (JD, MD, DMD, etc.)

Total Respondents: 66

RESPONSES

13.64% 9

60.61% 40

24.24% 16

13.64% 9

Q6 If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.

Answered: 43 Skipped: 25

Parish Administration in the Catholic Diocese of Cleveland

Question #6

If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.

anatomy/physiology undergrad and DDS as professional degree
B. A. History
BA -- history
BA in classical languages, Master of Divinity
BA in History MDiv
BA with history major
Bachelor of Art in Religious Studies
Bachelor of Arts (Latin and Philosophy)
Bachelors in Political Science
BS - Psychology
BS Accounting
BS Journalism; Master of Higher Education; Master of Divinity;
Master of Arts-Thcology
Business Administration
D.Min
English
history
History
History and philosophy
History with a minor in Philosophy
history, philosophy mdiv
JCD, STL
JCL
JCL & MCL
Juris Doctor
M Div.
M. Div.
M.Div.
MA in Clinical Community Psychology
MA in Liturgy
MA in the Social/Behavioral Sciences
Majors: Psychology & Philosophy
MBS
Mdiv
MDiv and MSW Undergrad major history.
MDiv, MA (thcology), MBA (non-profit corps), MA (Irish Studies)
MNA (Masters of Nonprofit Administration)
MS
none
none
Psychology
STD
undergrad major and master's degree in philosophy
Undergraduate major of social sciences

Q7 If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.

Answered: 35 Skipped: 33

Parish Administration in the Catholic Diocese of Cleveland

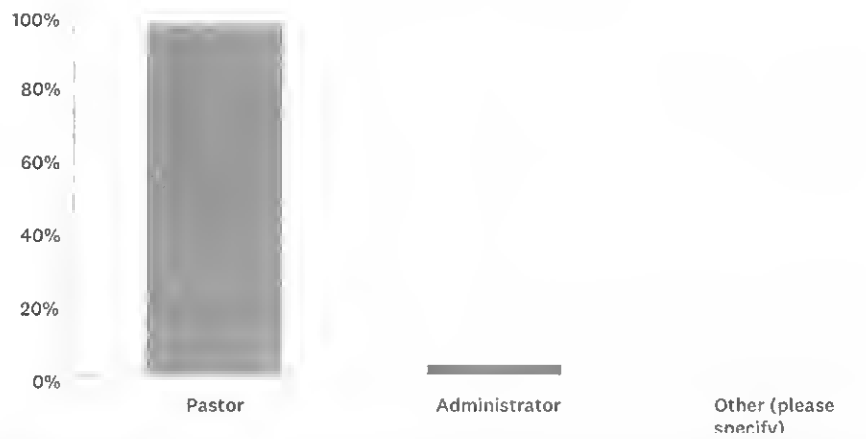
Question #7

If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.

A year of accounting, computer technician
Accountant
Accountant
Business Manager
Chef, Food Service Manager, Social Worker investigating
Child Abuse and neglect for a County Agency
chemical technician
Chemist
College Admission Officer
CPA
Dentist
Design & construction
Law Firm - clerk, office manager, secretary
Maintenance.
Many manual labor jobs including construction, custodian,
and food server.
mining worker for four summers
Music Teacher, Parish Music & Liturgy Minister and Youth
Minister
n/a
n/a
n/a
N/A
NA
none
none
none
None.
Nope!
Organic Chemist
Owed my own business
Physician's Assistant
prior to and while in the seminary: broadcast radio engineer,
truck fleet mechanic, machinist
Purchasing Agent
repairman
Restaurant Manager
Small business owner, lawyer
Sous chef of a major hotel

Q8 What is your position at the parish?

Answered: 64 Skipped: 4



ANSWER CHOICES

Pastor

Administrator

Other (please specify)

TOTAL

RESPONSES

96.88%

3.13%

0.00%

62

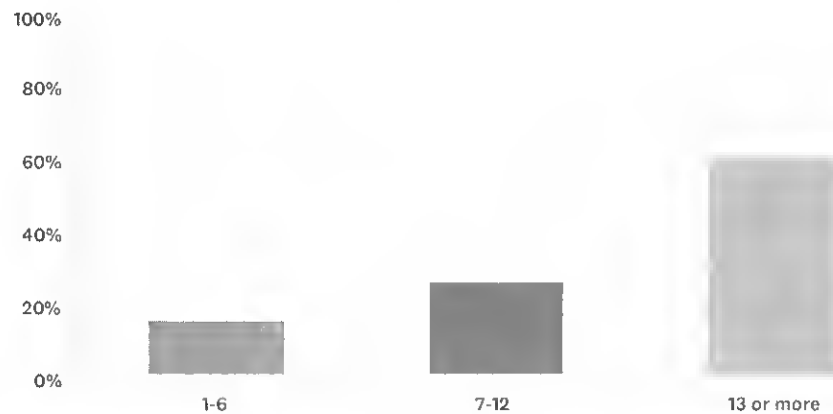
2

0

64

Q9 How many years have you been a pastor or administrator? Include the time that you served as pastor or administrator of another parish or parishes.

Answered: 67 Skipped: 1

**ANSWER CHOICES**

1-6

7-12

13 or more

TOTAL

RESPONSES

14.93%

25.37%

59.70%

10

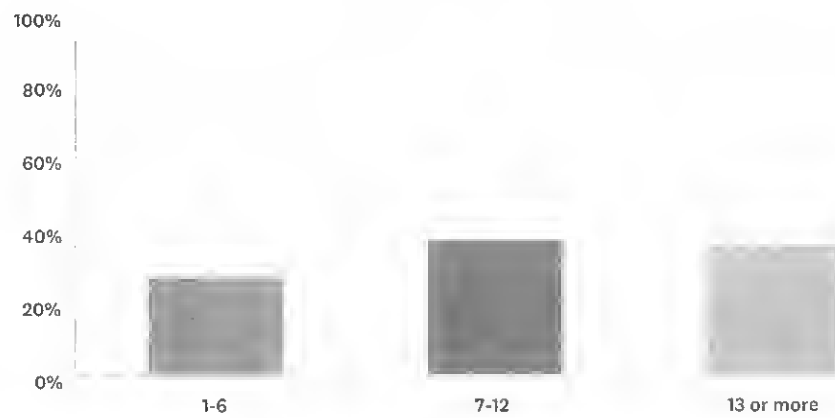
17

40

67

Q10 How many years have you been at your current parish?

Answered: 67 Skipped: 1



ANSWER CHOICES

1-6

7-12

13 or more

TOTAL

RESPONSES

26.87%

37.31%

35.82%

18

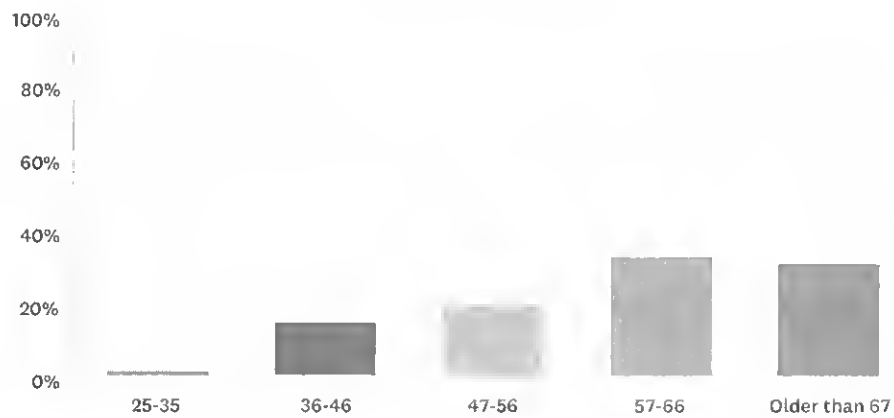
25

24

67

Q11 What is your age?

Answered: 67 Skipped: 1



ANSWER CHOICES

25-35

36-46

47-56

57-66

Older than 67

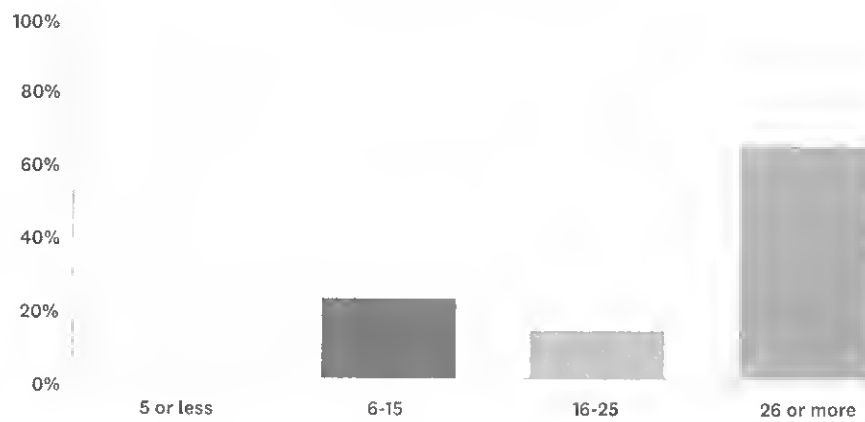
TOTAL

RESPONSES

1.49%	1
14.93%	10
19.40%	13
32.84%	22
31.34%	21
	67

Q12 How many years have you been ordained?

Answered: 67 Skipped: 1



ANSWER CHOICES

5 or less

6-15

16-25

26 or more

TOTAL

RESPONSES

0.00%

22.39%

13.43%

64.18%

0

15

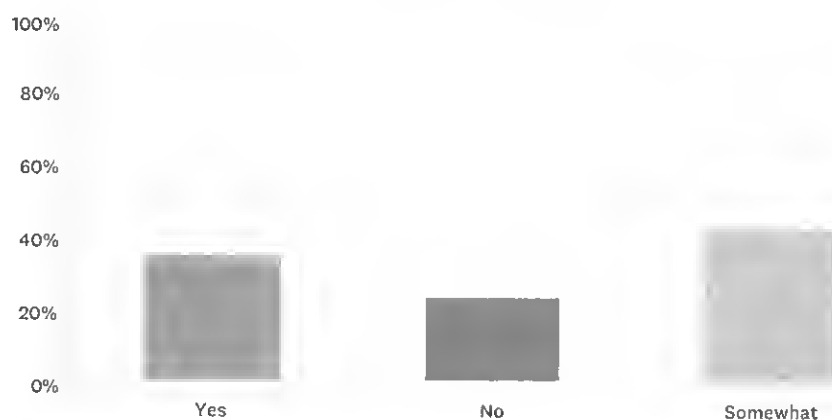
9

43

67

Q13 When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?

Answered: 64 Skipped: 4

**ANSWER CHOICES**

Yes

No

Somewhat

TOTAL

RESPONSES

34.38%

23.44%

42.19%

22

15

27

64

Q14 If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?

Answered: 34 Skipped: 34

Parish Administration in the Catholic Diocese of Cleveland

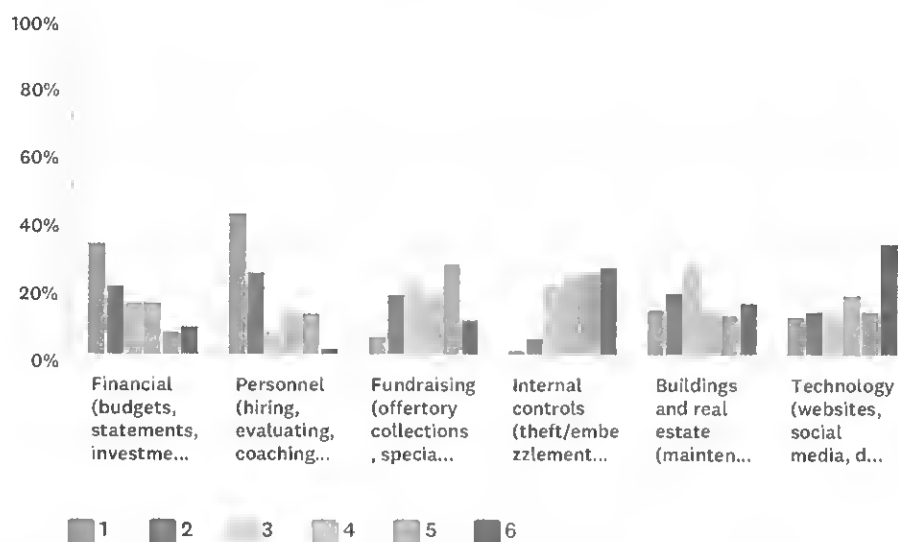
Question #14

If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?

accounting and budgeting
All
Bookkeeping, reporting of finance, hiring, insurance, pastoral planning
Bookkeeping; personnel
Budget and hiring people
Budgeting.
Buildings, Leasing properties i.e. school. Reading a Financial report
Business management and finance.
Employee management and diplomacy.
Finance and Human Resources and Legal
finances and fundraising
Financial and employee relations
fund raising, finances
Fundraising
fundraising, legal issues (civil), record management, use of technology in parish life (e.g census records, financial records & data management, social media), hiring and dealing with employee and volunteer issues, "best management practices"
General accounting practices
HR, pastoral planning, legal, diocesan inner workings/requirements
Human Resources is always changing and every parish has different challenges
I was lucky to have pastoral ministries experience before I studied and while I was a seminarian
I was unaware of Diocesan regulations and expectations (for example, volunteers are not covered by insurance...).
Maintenance of buildings and grounds
Most areas. Took several workshops beginning about 6 years before I became pastor (@ 11 years ordaincd). I had already been helping with administration during my time as PV.
n/a
N/A
N/A
Parish Accounting Procedures; how to label costs, payroll, budgeting.
Paying taxes
Personally mgt.? Finances?
Personnel
Personnel issues
personnel management, fundraising, legal issues
Personnel, facilities
Personnel, Finance
school personnel/ employee contracts, personnel negative interactions

Q15 Given what you now know, what did you wish you knew when you first became a pastor or administrator? 1 being most important and 6 being least important? Note that a number may only be used once.

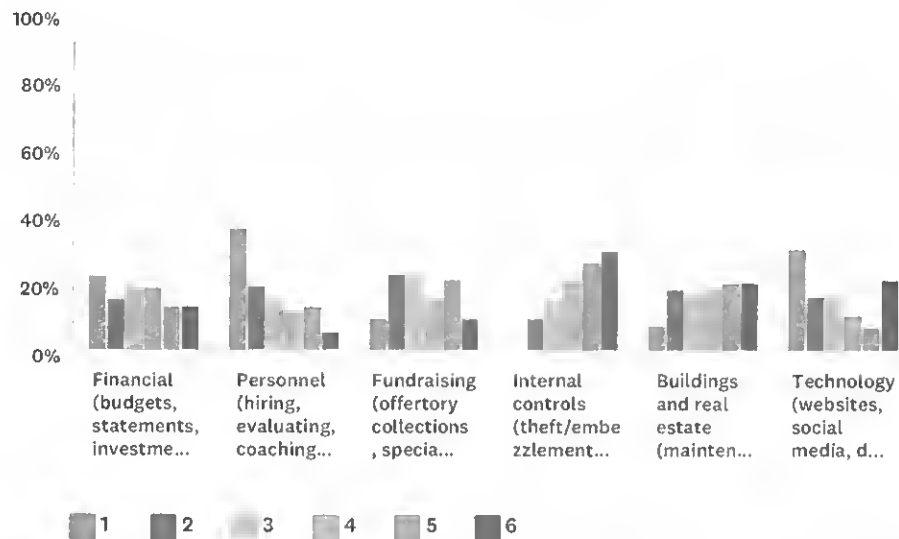
Answered: 64 Skipped: 4



	1	2	3	4	5	6	TOTAL	SCORE
Financial (budgets, statements, investments, etc.)	32.76% 19	20.69% 12	15.52% 9	15.52% 9	6.90% 4	8.62% 5	58	4.31
Personnel (hiring, evaluating, coaching, dismissal, etc.)	42.11% 24	24.56% 14	7.02% 4	12.28% 7	12.28% 7	1.75% 1	57	4.67
Fundraising (offertory collections, special projects, etc.)	5.36% 3	17.86% 10	21.43% 12	17.86% 10	26.79% 15	10.71% 6	56	3.25
Internal controls (theft/embezzlement prevention, etc.)	1.72% 1	5.17% 3	20.69% 12	22.41% 13	24.14% 14	25.86% 15	58	2.60
Buildings and real estate (maintenance, insurance, etc.)	13.56% 8	18.64% 11	27.12% 16	13.56% 8	11.86% 7	15.25% 9	59	3.63
Technology (websites, social media, data security, etc.)	11.48% 7	13.11% 8	11.48% 7	18.03% 11	13.11% 8	32.79% 20	61	2.93

Q16 In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.

Answered: 63 Skipped: 5



	1	2	3	4	5	6	TOTAL	SCORE
Financial (budgets, statements, investments, etc.)	22.22% 12	14.81% 8	18.52% 10	18.52% 10	12.96% 7	12.96% 7	54	3.76
Personnel (hiring, evaluating, coaching, dismissal, etc.)	35.85% 19	18.87% 10	15.09% 8	11.32% 6	13.21% 7	5.66% 3	53	4.36
Fundraising (offertory collections, special projects, etc.)	9.43% 5	22.64% 12	22.64% 12	15.09% 8	20.75% 11	9.43% 5	53	3.57
Internal controls (theft/embezzlement prevention, etc.)	0.00% 0	9.26% 5	14.81% 8	20.37% 11	25.93% 14	29.63% 16	54	2.48
Buildings and real estate (maintenance, insurance, etc.)	7.27% 4	18.18% 10	16.36% 9	18.18% 10	20.00% 11	20.00% 11	55	3.15
Technology (websites, social media, data security, etc.)	29.82% 17	15.79% 9	15.79% 9	10.53% 6	7.02% 4	21.05% 12	57	3.88

Q17 Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.

Answered: 31 Skipped: 37

Parish Administration in the Catholic Diocese of Cleveland

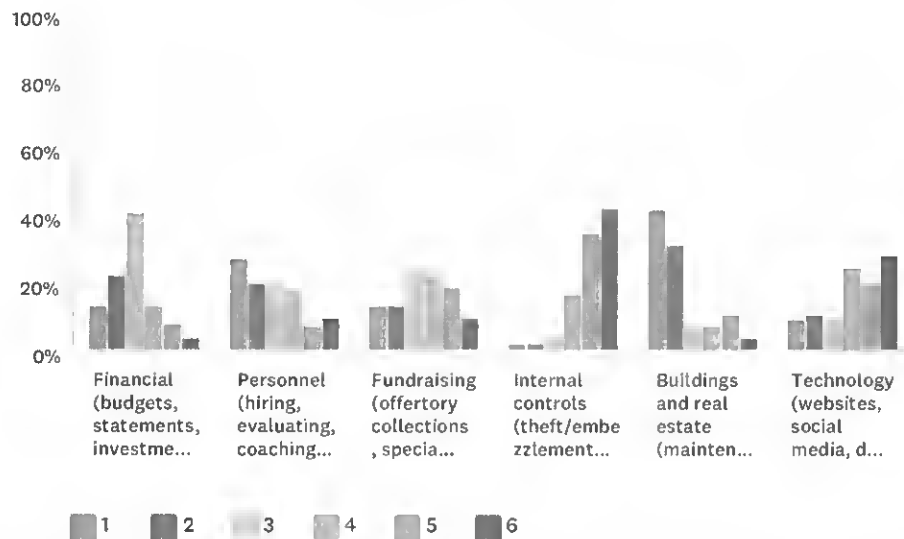
Question #17

Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.

balancing time with various essential ministries examples: nursing homes, hospitals, mass schedules school enrollment, school and daycare regulations, staff on all levels, PTA, facilities committee, school board stem program, parish and finance councils, festival and social action committees, spiritual programs and PSR etc.
Compliance Issues.
Creative inspirational leadership in Ligetting of Pope Francis and needs of our culture today
Day to day operation of a medium size business. Compliance with government and diocesan rules and regulations.
Diocesan inner workings and requirements, pastoral planning
Diocesan Policies
How to work with auditors who change the rules every time they make an audit.
Legal Issues
legal issues - contracts, etc. Diocese is helpful usually with these.
Managing difficult people Compliance with diocesan management/requirements
n/a
No
NO
No
No
no
no
No
no
no
No
Pastoral planning
Pastoral planning. This is also "administrative".
There is excessive bureaucratic paperwork required from the diocese, sometimes from two and three different offices, which delays and in some cases denies projects to the detriment of the parish.
This is, above all, a spiritual enterprise. That whole dimension seems to be overlooked in the questions asked.
Those with special needs including other languages and physical challenges
Time management
Time Management
Volunteer Recruitment, formation, usage.
When the parish school is rented to a charter school.

Q18 On average, what is your most time consuming administrative task?
 1 being most time consuming and 6 being least time consuming? Note that a number may only be used once.

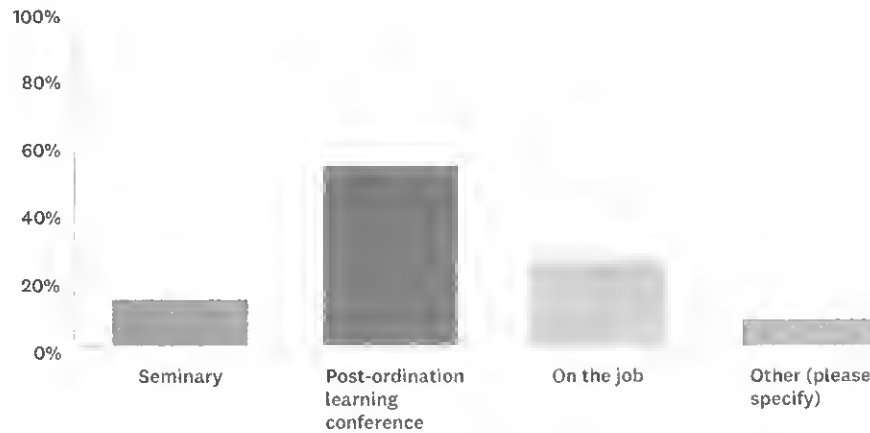
Answered: 62 Skipped: 6



	1	2	3	4	5	6	TOTAL	SCORE
Financial (budgets, statements, investments, etc.)	12.96% 7	22.22% 12	40.74% 22	12.96% 7	7.41% 4	3.70% 2	54	4.09
Personnel (hiring, evaluating, coaching, dismissal, etc.)	26.79% 15	19.64% 11	19.64% 11	17.86% 10	7.14% 4	8.93% 5	56	4.14
Fundraising (offertory collections, special projects, etc.)	12.96% 7	12.96% 7	24.07% 13	22.22% 12	18.52% 10	9.26% 5	54	3.52
Internal controls (theft/embezzlement prevention, etc.)	1.82% 1	1.82% 1	3.64% 2	16.36% 9	34.55% 19	41.82% 23	55	1.95
Buildings and real estate (maintenance, insurance, etc.)	41.38% 24	31.03% 18	6.90% 4	6.90% 4	10.34% 6	3.45% 2	58	4.76
Technology (websites, social media, data security, etc.)	8.77% 5	10.53% 6	8.77% 5	24.56% 14	19.30% 11	28.07% 16	57	2.81

Q19 Where, in your opinion, is the best place to learn what you wished you knew when you first became a pastor or administrator?

Answered: 64 Skipped: 4



ANSWER CHOICES

Seminary

Post-ordination learning conference

On the job

Other (please specify)

TOTAL

RESPONSES

14.06%	9
53.13%	34
25.00%	16
7.81%	5
	64

Parish Administration in the Catholic Diocese of Cleveland

Question #19

Where, in your opinion, is the best place to learn
what you wished you knew when you first became a
pastor or administrator?

Those that chose the response, "Other (please specify)."

Good prior pastors
Summer ministerial experiences and pastoral year
From other experienced pastors
coaching from professionals/other clergy
All the above

Q20 In your opinion, what is the hardest or most challenging area of parish administration and why? Please be specific with your comments.

Answered: 63 Skipped: 5

Parish Administration in the Catholic Diocese of Cleveland

Question #20

In your opinion, what is the hardest or most challenging area of parish administration and why? Please be specific with your comments.

All categories are mixed together or individually
As a pastor, I am responsible for everything. I find it arrogant that I try to be everything to everyone in all matters, administrative and spiritual, all of the time. And, the Church expects this from me. It is too bad that the Church had not planned to increase revenues so that parish budgets could allow for a professional business manager to take over these time consuming matters associated with administration.
balancing administrative responsibilities and pastoral ministry in a way that administration is at the service of ministry
Balancing the day to day operations of work, prayer, and budgets
being able to delegate the administration of the parish to competent persons
Being in charge of a school owing to the great diversity of what families want and the lack of school leadership we really want
Building maintenance. Lots of time consumed.
Building maintenance. Dealing with contractors and trades
Business management
Capital campaigns. The people are asked for too much money too often
Communication to the folks about the realities of what is happening, especially when it is bad news (declining numbers, tough financials, etc) - yet remain hopeful
Compliance with government and diocesan rules and regulations. Maintenance and upkeep of the aging property.
Dealing with conflict and personnel management
Dealing with different personalities.
Dealing with personnel
dealing with so many legal matters
Dealing with various personalities on staff. We've had to work a lot lately at team development, unity and a common vision. We asked a business coach for assistance and he's been a blessing to help bring a greater unity among the staff.
Difficult people and communication with everyone
Evaluating which person is needed for each role by understanding new creative ways of distributing workload according to a pastoral plan.
Finances - can't always count on contributions
Finances, the lack of people going to Church causes the drop in offertory and a Parish cannot be run by fundraising and it effects all other aspects
Financial Forms and Proper Documentation
Gathering Data about parish needs i.e. what parishioner needs are and demographic trends to help prepare for the future
government/diocese regulations
Human resource administration.
Human Resources
human resources
I know squat about financial forms, and frankly only care to know as much as I absolutely have to.
In our parish which is in a changing area, trying to balance the budget.
it is on the job learning in my experience - very little or no help from the Diocese in my experience
It is personal. I am a very sensitive person. I am more of a counselor or a healer.
Sometimes you need somebody who is more objective.
keeping the school going and staying on top of all the maintenance issues that arise or are addressed before they happendbeforeues that arise
Maintenance Issues
Maintenance issues and personnel issues
Making a budget that depends on the generosity of the parishioners.

Parish Administration in the Catholic Diocese of Cleveland

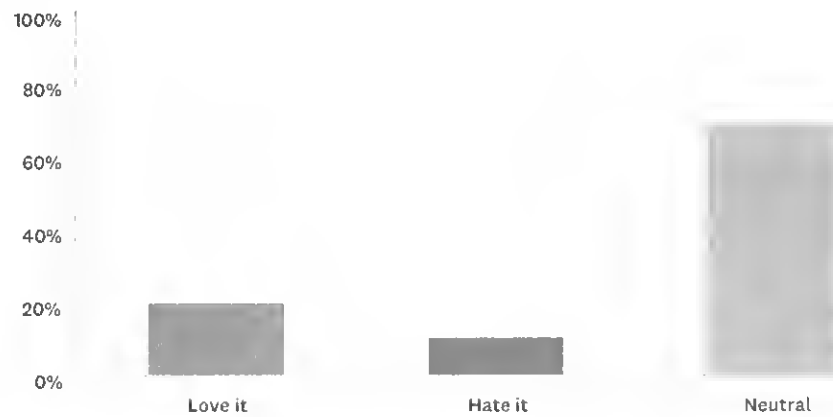
Question #20

In your opinion, what is the hardest or most challenging area of parish administration and why? Please be specific with your comments.

Managing employees
Managing Finances and preventative maintenance of the plant/buildings.
Managing personnel...evaluation, goals, firing, conflicts
New challenges that I have never encountered before
Not being trained for it
Paying the bills.
personell - hiring, motivating, evaluating, compensation. All are most important for building a community of service to the parish. I would say I have been lucky rather than good in making these decisions.
Personnel - especially those in support positions e.g. maintenance. When you get a good person, it's great, but often those less motivated but willing to accept the salary we can offer, present some very problematic situations and take an inordinate amount of time to deal with.
Personnel - its difficult blending personalities
Personnel issues
Personnel Issues
Personnel issues: best way to hire, fire, evaluate, etc.
Personnel issues. parishioners and employees
Personnel management
Personnel problems
Personnel problems - giving direction where needed and not offending or creating a larger problem(s)
Personnel: inherited wrong people for their roles but longevity prevents termination and lack of financial resources prevents hiring additional people with proper skill set to achieve proper mix.
Personnel.
Personnel. Hiring/firing are infrequent, but draining and time-consuming. Evaluations also take time in a large parish. Keeping staff from fussing with each other.
Understanding their own roles and each other's roles.
Personnel. Hiring and firing are very difficult because our current laws and procedures are complicated. The hardest thing I had to do as a pastor was let a book keeper go.
Personnel. There are many personalities, personal traits, and visions to try and balance.
personnel...
persons not following policy
Regulations of state and church programs and mandates
Right now, evaluating maintenance staff. I need to upgrade their attitude and work habits. Or get rid of them.
school issues. dealing with parents who do not understand what a Catholic school is working within a realistic budget
Working within an outdated system

Q21 How do you now feel about parish administrative tasks (financial, fundraising, planning, building/grounds maintenance, etc.)

Answered: 65 Skipped: 3



ANSWER CHOICES

Love it

Hate it

Neutral

TOTAL

RESPONSES

20.00% 13

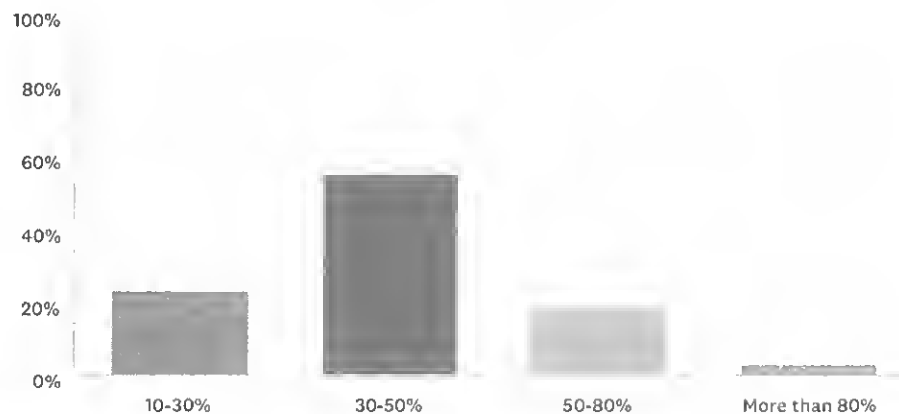
10.77% 7

69.23% 45

TOTAL 65

Q22 What percentage of your time, on average, do you now personally spend on administrative tasks? Do not include the time that others on your staff spend on administrative tasks.

Answered: 65 Skipped: 3

**ANSWER CHOICES**

10-30%

30-50%

50-80%

More than 80%

TOTAL

RESPONSES

23.08%

55.38%

18.46%

3.08%

15

36

12

2

65

Appendix C

Parish Administration in the Catholic Diocese of Cleveland (Individual Responses to Survey Questions *(Excel Format)*)

Respondent ID	Q #1: How many registered families are in your parish?		Q #2: What is your average ANNUAL offertory collection total?		AVERAGE OF MIDPOINT VALUES
	Q #1: Response	MIDPOINT OF RANGE	Q #2: Response	MIDPOINT OF RANGE	
6549563608	1,001-2,000	1,500	Less than \$500,000	250,000.00	166.67
6549597447	1,001-2,000	1,500	Less than \$500,000	250,000.00	166.67
6539479869	1,001-2,000	1,500	Less than \$500,000	250,000.00	166.67
6521792999	1,001-2,000	1,500	Less than \$500,000	250,000.00	166.67
6525493278	1,001-2,000	1,500	Less than \$500,000	250,000.00	166.67
6525542943	1,001-2,000	1,500	Less than \$500,000	250,000.00	166.67
6549436587	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6551085008	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6550540460	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6522404236	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6525268606	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6523965077	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6549682560	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6556594742	Over 2,000	2,500	\$500,001-\$1,000,000	750,000.00	300.00
6529403763	501-1,000	750	Less than \$500,000	250,000.00	333.33
6522590631	501-1,000	750	Less than \$500,000	250,000.00	333.33
6521812254	501-1,000	750	Less than \$500,000	250,000.00	333.33
6524458422	501-1,000	750	Less than \$500,000	250,000.00	333.33
6521801312	501-1,000	750	Less than \$500,000	250,000.00	333.33
6523480712	501-1,000	750	Less than \$500,000	250,000.00	333.33
6521628688	501-1,000	750	Less than \$500,000	250,000.00	333.33
6573385058	501-1,000	750	Less than \$500,000	250,000.00	333.33
6521825280	501-1,000	750	Less than \$500,000	250,000.00	333.33
6523495646	501-1,000	750	Less than \$500,000	250,000.00	333.33
6522333565	501-1,000	750	Less than \$500,000	250,000.00	333.33
6531792116	501-1,000	750	Less than \$500,000	250,000.00	333.33
6550127493	501-1,000	750	Less than \$500,000	250,000.00	333.33
6531578176	501-1,000	750	Less than \$500,000	250,000.00	333.33
6524958307	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6522751235	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6521348553	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6550028182	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6529001872	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6525268202	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6524093260	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6523549109	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6522498688	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6523047061	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Respondent ID	Q #1: How many registered families are in your parish?		Q #2: What is your average ANNUAL offertory collection total?		AVERAGE OF MIDPOINT VALUES
	Q #1: Response	MIDPOINT OF RANGE	Q #2: Response	MIDPOINT OF RANGE	
6523398474	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6523266148	1,001-2,000	1,500	\$500,001-\$1,000,000	750,000.00	500.00
6549656947	Over 2,000	2,500	\$1,000,001-\$1,500,000	1,250,000.00	500.00
6522278022	Over 2,000	2,500	\$1,000,001-\$1,500,000	1,250,000.00	500.00
6539058044	Over 2,000	2,500	\$1,000,001-\$1,500,000	1,250,000.00	500.00
6550738623	Over 2,000	2,500	\$1,000,001-\$1,500,000	1,250,000.00	500.00
6522074722	Over 2,000	2,500	\$1,000,001-\$1,500,000	1,250,000.00	500.00
6524084434	Over 2,000	2,500	\$1,000,001-\$1,500,000	1,250,000.00	500.00
6523874789	Over 2,000	2,500	\$1,000,001-\$1,500,000	1,250,000.00	500.00
6522253880	Over 2,000	2,500	\$1,500,001-\$2,000,000	1,750,000.00	700.00
6522420516	Over 2,000	2,500	\$1,500,001-\$2,000,000	1,750,000.00	700.00
6551338247	Over 2,000	2,500	\$1,500,001-\$2,000,000	1,750,000.00	700.00
6526412841	Over 2,000	2,500	\$1,500,001-\$2,000,000	1,750,000.00	700.00
6521505747	1,001-2,000	1,500	\$1,000,001-\$1,500,000	1,250,000.00	833.33
6549383914	1,001-2,000	1,500	\$1,000,001-\$1,500,000	1,250,000.00	833.33
6522813050	1,001-2,000	1,500	\$1,000,001-\$1,500,000	1,250,000.00	833.33
6550893375	501-1,000	750	\$500,001-\$1,000,000	750,000.00	1,000.00
6522456463	501-1,000	750	\$500,001-\$1,000,000	750,000.00	1,000.00
6521713643	501-1,000	750	\$500,001-\$1,000,000	750,000.00	1,000.00
6521856338	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6522476424	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6549467101	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6524662690	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6533796396	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6539619084	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6522555828	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6522873024	Less than 500	250	Less than \$500,000	250,000.00	1,000.00
6521965457	Over 2,000	2,500	Over \$2,000,000	2,500,000.00	1,000.00
6550741302	Over 2,000	2,500	Over \$2,000,000	2,500,000.00	1,000.00
6522595878					
6571566362					
6549678498					
6549439045					
6549394707					
6523221692					
6522598257					
		98,750		48,750,000.00	493.67
		TOTAL		TOTAL	AVERAGE OF TOTALS

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Respondent ID	Q #3: Is there a person at your parish, other than yourself, who is responsible for some or all administrative matters? Q #3: Response	Q #4: If you answered "yes" to question #3, what is the title of the person that is responsible for some or all administrative matters at your parish? Q #4: Open-Ended Response
6549563608	Yes, the person is responsible for SOME administrative matters	Business Manager
6549597447	Yes, the person is responsible for SOME administrative matters	Principal
6539479869	Yes, the person is responsible for SOME administrative matters	Business Manager & Receptionist
6521792999	No	
6525493278	Yes, the person is responsible for SOME administrative matters	Business Manager
6525542943	No	
6549436587	Yes, the person is responsible for SOME administrative matters	Business manager
6551085008	Yes, the person is responsible for SOME administrative matters	business manager
6550540460	Yes, the person is responsible for SOME administrative matters	Financial Assistant & Business Manager
6522404236	Yes, the person is responsible for SOME administrative matters	Bookkeeper
6525268606	Yes, the person is responsible for SOME administrative matters	Business Manager
6523965077	Yes, the person is responsible for SOME administrative matters	Business mgr...also another treasurer
6549682560	Yes, the person is responsible for SOME administrative matters	Business Manager AND Maintenance Manager (2 People)
6556594742	No	
6529403763	Yes, the person is responsible for SOME administrative matters	Office Manager, Bookkeeper
6522590631	No	
6521812254	Yes, the person is responsible for SOME administrative matters	Office Manager
6524458422	No	Pastor
6521801312	Yes, the person is responsible for ALL administrative matters	Office Manager
6523480712	Yes, the person is responsible for SOME administrative matters	Financial Administrator
6521628688	No	Pastor
6573385058	Yes, the person is responsible for ALL administrative matters	Finance Manager
6521825280	Yes, the person is responsible for SOME administrative matters	Parish Administrative Assistant
6523495646	Yes, the person is responsible for SOME administrative matters	Administrative Assistant
6522333565	No	
6531792116	Yes, the person is responsible for SOME administrative matters	office manager

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Respondent ID	Q #3: Is there a person at your parish, other than yourself, who is responsible for some or all administrative matters? Q #3: Response	Q #4: If you answered "yes" to question #3, what is the title of the person that is responsible for some or all administrative matters at your parish? Q #4: Open-Ended Response
6550127493	Yes, the person is responsible for SOME administrative matters	Secretary
6531578176	No	
6524958307	Yes, the person is responsible for SOME administrative matters	Business Manager
6522751235	No	Pastor
6521348553	Yes, the person is responsible for SOME administrative matters	Business Manager
6550028182	No	
6529001872	Yes, the person is responsible for SOME administrative matters	Business Manager
6525268202	No	Pastor
		Business and Properties Manager
6524093260	Yes, the person is responsible for SOME administrative matters	Manager
6523549109	Yes, the person is responsible for SOME administrative matters	Business Manager
6522498688	No	pastor
6523047061	No	
6523398474	Yes, the person is responsible for ALL administrative matters	Business Manager
6523266148	Yes, the person is responsible for SOME administrative matters	Pastoral associate
		financial-institutional manager
6549656947	Yes, the person is responsible for ALL administrative matters	Business Manager
6522278022	Yes, the person is responsible for ALL administrative matters	I've got both an Office Manager and a Business Manager
6539058044	Yes, the person is responsible for SOME administrative matters	Business Manager
6550738623	Yes, the person is responsible for SOME administrative matters	Business Manager
6522074722	Yes, the person is responsible for SOME administrative matters	Business manager
6524084434	Yes, the person is responsible for ALL administrative matters	Business Manager
6523874789	Yes, the person is responsible for ALL administrative matters	Business Manager
6522253880	Yes, the person is responsible for SOME administrative matters	Business Manager
6522420516	Yes, the person is responsible for SOME administrative matters	Business Manager
		Business Mgr. (Finances/Personnel).
6551338247	Yes, the person is responsible for SOME administrative matters	Also Facilities Mgr.
6526412841	Yes, the person is responsible for SOME administrative matters	business manager
6521505747	Yes, the person is responsible for ALL administrative matters	Business manager

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Respondent ID	Q #3: Is there a person at your parish, other than yourself, who is responsible for some or all administrative matters? Q #3: Response	Q #4: If you answered "yes" to question #3, what is the title of the person that is responsible for some or all administrative matters at your parish? Q #4: Open-Ended Response
6549383914	Yes, the person is responsible for SOME administrative matters	Director of maintenance and grounds
6522813050	Yes, the person is responsible for SOME administrative matters	Business Manager
6550893375	Yes, the person is responsible for SOME administrative matters	accountant
6522456463	No	
6521713643	Yes, the person is responsible for SOME administrative matters	Pastoral Associate
6521856338	Yes, the person is responsible for SOME administrative matters	Administrative Assistant
6522476424	No	
6549467101	Yes, the person is responsible for SOME administrative matters	Office Manager
6524662690	No	Pastor
6533796396	Yes, the person is responsible for ALL administrative matters	Business Manager
6539619084	Yes, the person is responsible for SOME administrative matters	Bookkeeper
6522555828	Yes, the person is responsible for SOME administrative matters	Stephanic Kowalczyk
6522873024	No	Pastor
6521965457	Yes, the person is responsible for SOME administrative matters	Administrative Assistant
6550741302	Yes, the person is responsible for SOME administrative matters	Office Manager and Building and Grounds Manager(2 people)
6522595878	No	The Pastor
6571566362		
6549678498		
6549439045		
6549394707		
6523221692		
6522598257		

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)	Q #6: Open-Ended Response	Q #7: Open-Ended Response	
6549563608	Not applicable						
6549597447	Not applicable						
6539479869			Graduate degree (MBA, etc.)		BS Journalism; Master of Higher Education; Master of Divinity; Master of Arts-Theology	College Admission Officer	YES
6521792999		Bachelor's degree			History and philosophy	Sous chef of a major hotel	YES
6525493278		Bachelor's degree	Graduate degree (MBA, etc.)		M. Div.	Physician's Assistant	
6525542943		Bachelor's degree			Undergraduate major of social sciences		
6549436587		Bachelor's degree				chemical technician	

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)			
6551085008		Bachelor's degree					
6550540460		Bachelor's degree					
6522404236	Not applicable						
6525268606		Bachelor's degree			History with a minor in Philosophy	Many manual labor jobs including construction, custodian, and food server.	
6523965077			Graduate degree (MBA, etc.)		M.Div.		
6549682560		Bachelor's degree				Organic Chemist	
6556594742		Bachelor's degree				Owed my own business	YES

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)			
6529403763		Bachelor's degree			BA -- history	n/a	
6522590631							
6521812254		Bachelor's degree					
6524458422		Bachelor's degree			BS Accounting	CPA	YES
6521801312				Professional degree (JD, MD, DMD, etc.)			
6523480712		Bachelor's degree			English		

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)	Q #6: Open-Ended Response	Q #7: Open-Ended Response	
6521628688				Professional degree (JD, MD, DMD, etc.)			
6573385058		Bachelor's degree	Graduate degree (MBA, etc.)			mining worker for four summers	
6521825280			Graduate degree (MBA, etc.)		MA in the Social/Behavioral Sciences	None.	
6523495646			Graduate degree (MBA, etc.)		MNA (Masters of Nonprofit Administration)	none	YES
6522333565			Graduate degree (MBA, etc.)		MS	Accountant	YES

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)	Q #6: Open-Ended Response	Q #7: Open-Ended Response	
6531792116	Not applicable				none	none	
6550127493		Bachelor's degree			Psychology	Chef, Food Service Manager, Social Worker investigating Child Abuse and neglect for a County Agency	
6531578176		Bachelor's degree	Graduate degree (MBA, etc.)		undergrad major and master's degree in philosophy	none	
6524958307		Bachelor's degree				A year of accounting, computer technician	YES
6522751235		Bachelor's degree			BA with history major	Nope!	
6521348553		Bachelor's degree			Bachelor of Art in Religious Studies	Restaurant Manager	YES
6550028182		Bachelor's degree			Bachelor of Arts (Latin and Philosophy)	Maintenance.	

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)			
6529001872		Bachelor's degree					
6525268202		Bachelor's degree			Business Administration	Accountant	YES
6524093260				Professional degree (JD, MD, DMD, etc.)	D.Min		
6523549109		Bachelor's degree			History		
6522498688	Not applicable				history, philosophy mdiv		
6523047061				Professional degree (JD, MD, DMD, etc.)	Juris Doctor	Small business owner, lawyer	YES

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)			
6523398474		Bachelor's degree	Graduate degree (MBA, etc.)				
6523266148	Not applicable	Bachelor's degree			M Div.		
6549656947		Bachelor's degree					
6522278022		Bachelor's degree			B. A. History		
6539058044		Bachelor's degree			BS - Psychology	N/A	
6550738623				Professional degree (JD, MD, DMD, etc.)	JCD, STL	n/a	
6522074722		Bachelor's degree					

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL. PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)			
6524084434			Graduate degree (MBA, etc.)		MA in Clinical Community Psychology	repairman	
6523874789			Graduate degree (MBA, etc.)		MA in Liturgy	Music Teacher, Parish Music & Liturgy Minister and Youth Minister	
6522253880		Bachelor's degree					
6522420516			Graduate degree (MBA, etc.)			Law Firm - clerk, office manager, secretary	YES
6551338247		Bachelor's degree			history		
6526412841		Bachelor's degree	Graduate degree (MBA, etc.)		MDiv, MA (theology). MBA (non-profit corps), MA (Irish Studies)	n/a	

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)	Q #6: Open-Ended Response	Q #7: Open-Ended Response	
6521505747							
6549383914			Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)	JCL & MCL		
6522813050		Bachelor's degree			MBS	Design & construction	YES
6550893375		Bachelor's degree		Professional degree (JD, MD, DMD, etc.)	anatomy/physiology undergrad and DDS as professional degree	Dentist	YES
6522456463		Bachelor's degree			Majors: Psychology & Philosophy		
6521713643				Professional degree (JD, MD, DMD, etc.)	STD		

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include, accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)			
6521856338		Bachelor's degree				Business Manager	YES
6522476424	Not applicable				BA in classical languages, Master of Divinity		
6549467101		Bachelor's degree	Graduate degree (MBA, etc.)			Chemist	
6524662690		Bachelor's degree					
6533796396				Professional degree (JD, MD, DMD, etc.)			
6539619084	Not applicable				JCL Mdiv		
6522555828		Bachelor's degree				Purchasing Agent	YES

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Respondent ID	Q #5: Besides seminary degrees (Master of Divinity, Master of Arts) what other educational background do you have? Check all that apply.				Q #6: If your answer to #5 is other than "Not applicable," please provide degree specifics, such as undergraduate major, MBA, JD, etc.	Q #7: If you had adult work experience, such as a profession or career, prior to your admission to the seminary, please offer a brief description. Examples include: accountant, lawyer, factory worker, engineer, etc.	COMFORT LEVEL PREDICTORS: BUSINESS-RELATED DEGREE OR WORK EXPERIENCE
	Not applicable	Bachelor's degree	Graduate degree (MBA, etc.)	Professional degree (JD, MD, DMD, etc.)			
6522873024	Not applicable				none	prior to and while in the seminary: broadcast radio engineer, truck fleet mechanic, machinist	
6521965457		Bachelor's degree			Bachelors in Political Science		
6550741302			Graduate degree (MBA, etc.)		MDiv and MSW Undergrad major history.		
6522595878		Bachelor's degree			BA in History MDiv	NA	
6571566362							
6549678498							
6549439045							
6549394707							
6523221692							
6522598257							

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Respondent ID	Q #8: What is your position at the parish?		Q #9: How many years have you been a pastor or administrator? Include the time that you served as pastor or administrator of another parish or parishes.	Q #10: How many years have you been at your current parish?	YEARS PASTOR YEARS AT PARISH	Q #11: What is your age?	Q #12: How many years have you been ordained?
	Response	Other (please specify)	Q #9: Response	Q #10: Response		Q #11: Response	Q #12: Response
6549563608	Pastor		13 or more	1-6	NO	57-66	26 or more
6549597447	Pastor		1-6	1-6	YES	36-46	6-15
6539479869	Pastor		7-12	7-12	YES	47-56	6-15
6521792999	Pastor		1-6	1-6	YES	36-46	6-15
6525493278	Pastor		7-12	7-12	YES	57-66	16-25
6525542943	Pastor		13 or more	13 or more	YES	47-56	26 or more
6549436587			7-12	7-12	YES	Older than 67	26 or more
6551085008	Pastor		13 or more	13 or more	YES	57-66	26 or more
6550540460	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6522404236	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6525268606	Pastor		13 or more	7-12	NO	Older than 67	26 or more
6523965077	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6549682560	Pastor		7-12	7-12	YES	47-56	16-25
6556594742	Pastor		7-12	7-12	YES	47-56	6-15
6529403763	Pastor		13 or more	13 or more	YES	57-66	26 or more
6522590631			13 or more	13 or more	YES	57-66	26 or more
6521812254	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6524458422	Pastor		7-12	7-12	YES	47-56	16-25
6521801312	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6523480712	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6521628688	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6573385058	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6521825280	Pastor		7-12	13 or more	NO	57-66	26 or more
6523495646	Administrator		1-6	1-6	YES	36-46	6-15
6522333565	Pastor		7-12	7-12	YES	47-56	6-15
6531792116	Pastor		13 or more	7-12	NO	57-66	26 or more
6550127493	Pastor		1-6	1-6	YES	57-66	16-25
6531578176	Pastor		13 or more	1-6	NO	57-66	26 or more
6524958307	Pastor		7-12	1-6	NO	36-46	6-15
6522751235	Pastor		13 or more	13 or more	YES	57-66	26 or more
6521348553	Pastor		7-12	7-12	YES	36-46	6-15
6550028182	Pastor		1-6	1-6	YES	25-35	6-15
6529001872	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6525268202	Pastor		13 or more	1-6	NO	Older than 67	26 or more
6524093260	Pastor		13 or more	1-6	NO	57-66	26 or more
6523549109	Pastor		13 or more	7-12	NO	57-66	26 or more
6522498688	Pastor		13 or more	1-6	NO	47-56	16-25
6523047061	Pastor		1-6	1-6	YES	47-56	6-15
6523398474	Pastor		1-6	1-6	YES	36-46	6-15
6523266148	Pastor		13 or more	13 or more	YES	57-66	26 or more
6549656947	Pastor		13 or more	7-12	NO	57-66	26 or more
6522278022	Pastor		13 or more	13 or more	YES	57-66	26 or more
6539058044	Pastor		1-6	1-6	YES	36-46	6-15

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Respondent ID	Q #8: What is your position at the parish?		Q #9: How many years have you been a pastor or administrator? Include the time that you served as pastor or administrator of another parish or parishes.	Q #10: How many years have you been at your current parish?	YEARS PASTOR YEARS AT PARISH	Q #11: What is your age?	Q #12: How many years have you been ordained?
	Response	Other (please specify)	Q #9: Response	Q #10: Response		Q #11: Response	Q #12: Response
6550738623	Pastor		7-12	7-12	YES	Older than 67	26 or more
6522074722	Pastor		7-12	7-12	YES	36-46	16-25
6524084434	Pastor		13 or more	13 or more	YES	57-66	26 or more
6523874789	Pastor		13 or more	7-12	NO	47-56	16-25
6522253880	Pastor		7-12	7-12	YES	47-56	16-25
6522420516	Pastor		13 or more	13 or more	YES	47-56	26 or more
6551338247	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6526412841	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6521505747							
6549383914	Pastor		7-12	7-12	YES	57-66	26 or more
6522813050	Pastor		7-12	7-12	YES	47-56	16-25
6550893375	Pastor		13 or more	1-6	NO	57-66	26 or more
6522456463	Administrator		1-6	1-6	YES	36-46	6-15
6521713643	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6521856338	Pastor		7-12	7-12	YES	36-46	6-15
6522476424	Pastor		13 or more	1-6	NO	Older than 67	26 or more
6549467101	Pastor		13 or more	7-12	NO	57-66	26 or more
6524662690			13 or more	13 or more	YES	Older than 67	26 or more
6533796396	Pastor		1-6	1-6	YES	57-66	26 or more
6539619084	Pastor		13 or more	7-12	NO	Older than 67	26 or more
6522555828	Pastor		7-12	7-12	YES	47-56	6-15
6522873024	Pastor		13 or more	7-12	NO	Older than 67	26 or more
6521965457	Pastor		13 or more	7-12	NO	57-66	26 or more
6550741302	Pastor		13 or more	13 or more	YES	Older than 67	26 or more
6522595878	Pastor		13 or more	7-12	NO	57-66	26 or more
6571566362							
6549678498							
6549439045							
6549394707							
6523221692							
6522598257							

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Respondent ID	Q #13: When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?	CATEGORY OF #14 (KEY: F=FINANCIAL, HR=HUMAN RESOURCES, R=REAL ESTATE, S=FUNDRAISING, P=PLANNING, L=LEGAL)								
		Q #13: Response	Q #14: Open-Ended Response Q #14: If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?	F	HR	R	S	P	L	
6549563608	Somewhat	Budgeting.	F							
6549597447	Somewhat	HR, pastoral planning, legal, diocesan inner workings/requirements		HR				P	L	
6539479869	Yes									
6521792999	Yes	All								
6525493278	No									
6525542943	No									
6549436587	Somewhat	finances and fundraising	F				S			
6551085008	Yes									
6550540460	Yes									
6522404236	Yes									
6525268606	Somewhat	General accounting practices	F							
6523965077	Somewhat	Personally mgt.? Finances?	F	HR						
6549682560	Somewhat	Human Resources is always changing and every parish has different challenges		HR						
6556594742	Yes									

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Respondent ID	Q #13: When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?	Q #13: Response	CATEGORY OF #14 (KEY: F=FINANCIAL, IIR=HUMAN RESOURCES, R-REAL ESTATE, §=FUNDRAISING, P-PLANNING, L-LEGAL)						
			Q #14: Open-Ended Response	F	IIR	R	§	P	L
			Q #14: If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?						
			fundraising, legal issues (civil), record management, use of technology in parish life (e.g census records, financial records & data management, social media), hiring and dealing with employee and volunteer issues, "best management practices"				§		L
6529403763	Somewhat								
6522590631	No								
6521812254	Somewhat		Business management and finance.	F					
6524458422	Yes								
6521801312	Yes		Financial and employee relations						
6523480712	No								
6521628688	Somewhat		Fundraising				§		
6573385058	No								
6521825280	No								
6523495646	Yes								
6522333565	Yes								
6531792116	No								

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Respondent ID	Q #13: When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?	Q #13: Response	CATEGORY OF #14 (KEY: F=FINANCIAL, HR=HUMAN RESOURCES, R=REAL ESTATE, S=FUNDRAISING, P=PLANNING, L=LEGAL)							
			Q #14: If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?							
			Q #14: Open-Ended Response	F	HR	R	S	P	L	
6550127493	Somewhat		Buildings, Leasing properties i.e. school. Reading a Financial report	F		R				
6531578176	Yes									
6524958307	Somewhat		Bookkeeping, reporting of finance, hiring, insurance, pastoral planning	F	HR				P	
6522751235	Yes									
6521348553	No		Finance and Human Resources and Legal							
6550028182	Somewhat		Employee management and diplomacy.		HR					
6529001872	Somewhat		personnel management, fundraising, legal issues		HR		S			L
6525268202	Yes		N/A							
6524093260	Somewhat		Bookkeeping; personnel	F	HR					
6523549109	No									
6522498688										
6523047061	No									
6523398474	Somewhat		Budget and hiring people	F	HR					
6523266148	Somewhat		Personnel		HR					

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Respondent ID	Q #13: When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?	CATEGORY OF #14 (KEY: F=FINANCIAL, HR=HUMAN RESOURCES, R=REAL ESTATE, \$=FUNDRAISING, P=PLANNING, L=LEGAL)								
		Q #13: Response	Q #14: Open-Ended Response	F	HR	R	\$	P	L	
6549656947	Somewhat		Q #14: If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?	F						
6522278022			accounting and budgeting							
6539058044	Yes									
6550738623	Somewhat		fund raising, finances	F			\$			
6522074722	No									
6524084434	No		N/A							
6523874789	Yes		I was lucky to have pastoral ministries experience before I studied and while I was a seminarian							
6522253880	Yes									
6522420516	No									
			Most areas. Took several workshops beginning about 6 years before I became pastor (@ 11 years ordained). I had already been helping with administration during my time as PV.							
6551338247	Somewhat									
6526412841	Yes									
6521505747										
6549383914	Yes									

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Respondent ID	Q #13: When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?	Q #13: Response		CATEGORY OF #14 (KEY: F=FINANCIAL, HR=HUMAN RESOURCES, R-REAL ESTATE, \$ FUNDRAISING, P=PLANNING, L=LEGAL)						
				Q #14: Open-Ended Response	F	HR	R	\$	P	L
6522813050	Yes									
6550893375	Somewhat			school personnel/ employee contracts, personnel negative interactions		HR				L
6522456463	Somewhat			Personnel, Finance	F	HR				
6521713643	Somewhat			Paying taxes	F					
6521856338	Yes									
6522476424	Somewhat			Maintenance of buildings and grounds			R			
				I was unaware of Diocesan regulations and expectations (for example, volunteers are not covered by insurance...).						
6549467101	Somewhat									
6524662690	No									
6533796396										
6539619084	Yes									
6522555828	Somewhat			Parish Accounting Procedures; how to label costs, payroll, budgeting.	F					
6522873024	No			n/a						
6521965457	Somewhat			Personnel, facilities		HR	R			

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Respondent ID	Q #13: When you first stepped into the role of pastor or administrator, did you feel prepared to undertake the administration (finances, management of personnel, fundraising, etc.) of a parish?	Q #14: If you answered "Somewhat," in what area or areas was your knowledge or skill not sufficient?	CATEGORY OF #14 (KEY: F=FINANCIAL, HR=HUMAN RESOURCES, R=REAL ESTATE, S=FUNDRAISING, P=PLANNING, L=LEGAL)						
	Q #13: Response	Q #14: Open-Ended Response	F	HR	R	S	P	L	
6550741302	Yes								
6522595878	Somewhat	Personnel issues		HR					
6571566362									
6549678498									
6549439045									
6549394707									
6523221692									
6522598257									

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Respondent ID	Q #15: Given what you now know, what did you wish you knew when you first became a pastor or administrator? 1 being most important and 6 being least important? Note that a number may only be used once.					
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)
6549563608	1	2	5	4	3	6
6549597447	2	1	4	3	5	6
6539479869	4	5	1	3	2	6
6521792999	1		2	6	3	5
6525493278				4		3
6525542943	3	1	5	6	2	4
6549436587	1	2	4	6	5	3
6551085008		1			3	2
6550540460	1	4	3	5	2	6
6522404236	1	2	3	5	4	6
6525268606	4	1	5	6	3	2
6523965077	2	1	3	5	6	4
6549682560	2	1	6	3	4	5
6556594742	6	5	1	3	4	2
6529403763	5	1	2	6	3	4
6522590631	4			5		6
6521812254	1	4	3	6		
6524458422	6	1	3	4	2	5
6521801312		2			1	4
6523480712	1	4	5	6	3	2
6521628688		4	6	3	2	1
6573385058	1					
6521825280	1	2	6	5	3	4
6523495646	2	4	3	5	1	6
6522333565	6	1	4	5	2	3
6531792116	2	3	6	4	1	5
6550127493	2	6	3	5	1	4
6531578176	4	1	5	3	2	6
6524958307	1	2	4	5	6	3
6522751235	1	2	5	6	4	3
6521348553	5		2	3	6	1
6550028182	2	1	5	4	3	6
6529001872	3	1	2	4	5	6
6525268202	6	5	2	3	1	4
6524093260		1			3	4
6523549109	3	1	5	6	2	4
6522498688						
6523047061	4	2	3	1	5	6
6523398474						1
6523266148						
6549656947	2	1	3	4	5	6

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Respondent ID	Q #15: Given what you now know, what did you wish you knew when you first became a pastor or administrator? 1 being most important and 6 being least important? Note that a number may only be used once.					
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)
6522278022						
6539058044	2	1	5	4	3	6
6550738623	4	3	2	5	6	1
6522074722	2	1	4	3	6	5
6524084434	1	2	5	6	3	4
6523874789	1		3		2	5
6522253880	4	1	6	3	5	2
6522420516	2	1	3	5	4	6
6551338247	2	1	4	5	3	6
6526412841	3	1	5	4	6	2
6521505747						
6549383914	5	3	2	6	4	1
6522813050	3	5	6	4	1	2
6550893375	5	1	2	3	6	4
6522456463	1	2	4	5	3	6
6521713643	1	4	5	6	2	3
6521856338	6	1	5	3	4	2
6522476424	3	2	4	5	1	6
6549467101	3	5	4	6	2	1
6524662690	1	3	2	4	6	5
6533796396	4	2	5	6	1	3
6539619084	1	2	4	6	3	5
6522555828	1	2	3	4	5	6
6522873024	1	5	2	4	3	6
6521965457	3	5	1	2	4	6
6550741302	3	4	5	2	6	1
6522595878	4	1		2	3	
6571566362						
6549678498						
6549439045						
6549394707						
6523221692						
6522598257						

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Respondent ID	Q #16: In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.						Q #17: Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	Q #17: Open-Ended Response
6549563608	1	2	5	4	3	6	Diocesan inner workings and requirements, pastoral planning
6549597447	1	5	2	3	6	4	
6539479869	4	3	5	2	1	6	
6521792999	1		2	6	3	5	
6525493278	5			3			
6525542943	1	5	3	6	4	2	
							balancing time with various essential ministries examples: nursing homes, hospitals, mass schedules school enrollment, school and daycare regulations, staff on all levels,PTA, facilities committee,school board stem program, parish and finance councils, festival and social action committees, spiritual programs and PSR etc.
6549436587	1	3	4	6	5	2	
6551085008						2	
6550540460	2	1	3	4	6	5	
6522404236	3	1	2	5	4	6	no

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Respondent ID	Q #16: In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.						Q #17: Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	
6525268606	6	2	3	5	4	1	Q #17: Open-Ended Response How to work with auditors who change the rules every time they make an audit. Creative inspirational leadership in Ligetting of Pope Francis and needs of our culture today Those with special needs including other languages and physical challenges
6523965077	2	1	4	6	5	3	
6549682560	3	1	5	4	2	6	
6556594742	6	4	2	3	5	1	
6529403763	5	3	2	6	4	1	
6522590631	5			3		6	
6521812254		3	6				
6524458422	6	2	3		4	5	
6521801312					1		
6523480712	3	4	5	6	2	1	
6521628688			6		3	2	3 Compliance Issues. 6 Diocesan Policies
6573385058	1						
6521825280	1	2	6	4	5	3	
6523495646	3	4	2	5	1	6	
6522333565	6	1	4	5	2	3	

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Respondent ID	Q #16: In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.						Q #17: Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offerory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	
6531792116	5	4	3	2	6	1	There is excessive bureaucratic paperwork required from the diocese, sometimes from two and three different offices, which delays and in some cases denies projects to the detriment of the parish.
6550127493	2	6	3	5	1	4	
6531578176	4	2	6	5	3	1	
6524958307	6	1	5	2	3	4	
6522751235	2	3	4	6	5	1	
6521348553			2	4	6	1	
6550028182	3	1	2	4	5	6	
6529001872	3	1	2	4	5	6	
6525268202	6	5	1	4	2	3	
6524093260		1		5	3	6	
6523549109	4	1	5	6	2	3	legal issues - contracts, etc. Diocese is helpful usually with these.
6522498688							

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Respondent ID	Q #16: In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.						Q #17: Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	
6523047061	4	3	1	2	5	6	Day to day operation of a medium size business. Compliance with government and diocesan rules and regulations.
6523398474						1	No
6523266148						3	
6549656947	1	2	4	6	5		
6522278022							
6539058044	4	1	5	3	6	2	
6550738623	2	3	4				This is, above all, a spiritual enterprise.
6522074722	2	1	3	5	6	1	That whole dimension seems to be overlooked in the questions asked.
6524084434	1	2	5	6	3	4 no	
6523874789						Time management	
6522253880						1	
6522420516	2	1	6	4	5	3	
6551338247	4	1	5	3	6	2	
6526412841	4	2	3	5	6	1	
6521505747							
6549383914	6	5	1	4	3	2	

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Respondent ID	Q #16: In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.						Q #17: Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (thft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	
6522813050	3	5	4	6	2	1	
6550893375	5	4	2	3	6	1 no	
6522456463	4	1	2	5	3	6	
6521713643	3	2	5	6	4	1	
6521856338	5	1	3	6	4	2	
6522476424	1	6	3	5	2	4	
6549467101	3	6	2	5	4	1 "administrative"	Pastoral planning. This is also
6524662690	1	5	3	4	6	2 NO	
6533796396	4	5	1	6	2	3 No	
6539619084	2	1	5	6	4	3	
6522555828	1	3	4	5	2	6 charter school.	When the parish school is rented to a
6522873024	3	4	1	6	2	5 n/a	
6521965457		1					Managing difficult people Compliance with diocesan management/requirements
6550741302	4	2		3	5	1	
6522595878	5	1	3	2	4		
6571566362							
6549678498							

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Respondent ID	Q #16: In order of importance, what area would benefit you most in the development of your own skill set as a pastor or administrator at the present time? In other words, what do you wish you knew more about right now? 1 being the most important and 6 being least important? Note that a number may only be used once.						Q #17: Is there another topic or category not listed above in question #16 related to parish administration that merits coverage? Please be specific with your comments.
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offeritory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	
6549439045							Q #17: Open-Ended Response
6549394707							
6523221692							
6522598257							

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Respondent ID	Q #18: On average, what is your most time consuming administrative task? 1 being most time consuming and 6 being least time consuming? Note that a number may only be used once.							Q #19: Where, in your opinion, is the best place to learn what you wished you knew when you first became a pastor or administrator?	
	Financial (budgets, statements, investments, etc.)	Persomel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement, prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)		Q #19: Response	Q #19: Other (please specify)
6549563608	3	4	6	5	1	2		Post-ordination learning conference	
6549597447	1	2	3	4	5	6		Other (please specify)	All the above
6539479869	5	3	2	6	1	4		On the job	
								Post-ordination learning conference	
6521792999								Post-ordination learning conference	
6525493278								Post-ordination learning conference	
6525542943	5	4	2	6	1	3		Post-ordination learning conference	
6549436587	2	6	3	5	4	1		Seminary	
								Post-ordination learning conference	
6551085008	2	1	3	6	5	4		Post-ordination learning conference	
6550540460	4	2	1	3	5	6		On the job	
6522404236	3	4	2	5	1	6		On the job	
6525268606	3	4	5	6	1	2		Seminary	
								Post-ordination learning conference	
6523965077	2	1	3	4	6	5		Post-ordination learning conference	
6549682560	1	3	4	6	2	5		Post-ordination learning conference	
6556594742	2	3	4	5	1	6		Post-ordination learning conference	
6529403763	4	1	3	6	2	5		Post-ordination learning conference	
6522590631	3	4		6	1	5		Post-ordination learning conference	

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	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offerory collections, special projects, etc.)	Internal controls (theft/ embezzlement, prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	Q #19: Response	Q #19: Other (please specify)
6521812254			1		2		Post-ordination learning conference	
6524458422		2		5	4	6	On the job	
6521801312		3	4	6	1	5	Other (please specify)	From other experienced pastors
6523480712	3	2	5	6	1	4	On the job	
6521628688		3		1		4	Seminary	
6573385058					1		Post-ordination learning conference	
6521825280	2	3	4	5	1	6	Seminary	
6523495646	4	3	5	6	1	2	Post-ordination learning	
6522333565	5	2	3	6	1	4	Post-ordination learning conference	
6531792116	2	4	5	3	1	6	On the job	
6550127493	2	6	3	5	1	4	Seminary	
6531578176	4	1	6	5	2	3	Post-ordination learning conference	
6524958307	3	1	2	4	5	6	Post-ordination learning conference	
6522751235	3	2	1	6	5	4	On the job	
6521348553	2	3			4	1	Post-ordination learning conference	
6550028182	3	1	5	4	2	6	On the job	
6529001872	1	3	4	5	2	6	Post-ordination learning conference	

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Respondent ID	Q #18: On average, what is your most time consuming administrative task? 1 being most time consuming and 6 being least time consuming? Note that a number may only be used once.							Q #19: Where, in your opinion, is the best place to learn what you wished you knew when you first became a pastor or administrator?	
	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)		Q #19: Response	Q #19: Other (please specify)
6525268202	3	4	1	6	2	5		Seminary	
6524093260		2		4	3	5		Post-ordination learning	
6523549109	3	2	5	6	1	4		Post-ordination learning	
6522498688								Post-ordination learning	
6523047061	4	1	3	5	2	6		Seminary	
6523398474			5		3	6		On the job	
6523266148	6	1	5	4	2	3		Post-ordination learning	
6549656947	3	1	4	5	2	6		Post-ordination learning	
6522278022								Post-ordination learning	
6539058044	3	1	6	4	5	2		On the job	
6550738623	3	1	4	6	2	5		Post-ordination learning	
6522074722	3	1	4	5	2	6		Post-ordination learning	
6524084434	3	4	5	6	1	2		On the job	
6523874789	3	2	1		4			Other (please specify)	Summer ministerial experiences and pastoral year
6522253880	1							Post-ordination learning	
6522420516	2	1	4	5	6	3		Post-ordination learning	

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	Financial (budgets, statements, investments, etc.)	Personnel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offertory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	Q #19: Response	Q #19: Other (please specify)
6551338247	2	1	5	6	3	4	Post-ordination learning	
6526412841	6	3	1	4	2	5	On the job	
6521505747								
6549383914			1				Post-ordination learning	
6522813050	4	5	3	6	2	1	On the job	
6550893375	1	4	3	6	2	5	Post-ordination learning	
6522456463	3	2	4	5	1	6	On the job	coaching from professionals/other clergy
6521713643	4	5	3	6	2	1	Other (please specify)	
6521856338	1	5	6	4	2	3	Post-ordination learning	
6522476424	2	3	4	5	1	6	Post-ordination learning	
6549467101	3	6	2	5	1	4	On the job	
6524662690	1	6	2	5	3	4	Seminary	
6533796396	5	4	3	6	1	2		
6539619084	3	2	4	6	1	5	Other (please specify)	Good prior pastors
6522555828	3	5	2	6	1	4	Post-ordination learning	
6522873024	2	6	3	5	1	4	On the job	
6521965457	3	1	6	5	2	4	Post-ordination learning	

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Respondent ID	Q #18: On average, what is your most time consuming administrative task? 1 being most time consuming and 6 being least time consuming? Note that a number may only be used once.						Q #19: Where, in your opinion, is the best place to learn what you wished you knew when you first became a pastor or administrator?	
	Financial (budgets, statements, investments, etc.)	Persomel (hiring, evaluating, coaching, dismissal, etc.)	Fundraising (offeritory collections, special projects, etc.)	Internal controls (theft/ embezzlement prevention, etc.)	Buildings and real estate (maintenance, insurance, etc.)	Technology (websites, social media, data security, etc.)	Q #19: Response	Q #19: Other (please specify)
6550741302							Post-ordination learning conference	
6522595878	3			2			1 Seminary	
6571566362								
6549678498								
6549439045								
6549394707								
6523221692								
6522598257								

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Respondent ID	Q #20: In your opinion, what is the hardest or most challenging area of parish administration and why? Please be specific with your comments.	CATEGORY OF #20 (KEY: S=SCHOOL, M-MENTORING/TRAINING SUPPORT, C-COLLECTIONS FUNDRAISING, REGS- DIOCESAN/GOVT, LGL-LEGAL, F FINANCES, B-BUILDINGS REAL ESTATE, T-TIME MANAGEMENT, L- LEADERSHIP, IIR=HUMAN RESOURCES)										Q #21: How do you now feel about parish administrative tasks (financial, fundraising, planning, building/grounds maintenance, etc.)	Q #22: What percentage of your time, on average, do you now personally spend on administrative tasks? Do not include the time that others on your staff spend on administrative tasks.	MIDPOINT OF RANGE
		S	M	C	REGS	LGL	F	B	T	L	IIR			
6549563608	Q #20: Open-Ended Response Personnel issues: best way to hire, fire, evaluate, etc.									L	IIR	Neutral	10-30%	20
	Communication to the folks about the realities of what is happening, especially when it is bad news (declining numbers, tough financials, etc)													
6549597447	yet remain hopeful											Neutral	30-50%	40
6539479869	Personnel Issues										IIR	Love it	30-50%	40
6521792999	Not being trained for it		M									Hate it	50-80%	65
6525493278												Neutral	50-80%	65
	I know squat about financial forms, and frankly only care to know as much as I absolutely have to.													
6525542943	keeping the school going and staying on top of all the maintenance issues that arise or are addressed before they happenbeforeues that arise						F					Neutral	10-30%	20
6549436587		S										Neutral	50-80%	65

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		S	M	C	REGS	LGL	F	B	T	L	IIR			
6551085008	Q #20: Open-Ended Response: being able to delegate the administration of the parish to competent persons									L	IIR	Neutral	30-50%	40
6550540460	it is on the job learning in my experience - very little or no help from the Diocese in my experience		M											
6522404236	Managing employees									L	IIR	Neutral	50-80%	65
6525268606	In our parish which is in a changing area, trying to balance the budget.			C			F					Neutral	50-80%	65
6523965077	Personnel issues..parishioners and employees									L	IIR	Neutral	30-50%	40
6549682560	Finances, the lack of people going to Church causes the drop in offertory and a Parish cannot be run by fundraising and it effects all other aspects											Neutral	50-80%	65

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		S	M	C	REGS	LGL	I	B	T	L	HR	MIDPOINT OF RANGE				
6556594742	Q #20: Open-Ended Response As a pastor, I am responsible for everything. I find it arrogant that I try to be everything to everyone in all matters, administrative and spiritual, all of the time. And, the Church expects this from me. It is too bad that the Church had not planned to increase revenues so that parish budgets could allow for a professional business manager to take over these time consuming matters associated with administration.														30-50%	40
	balancing administrative responsibilities and pastoral ministry in a way that administration is at the service of ministry													Love it		
6529403763															30-50%	40

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		S	M	C	REGS	LGL	F	B	T	L	IIR			
	Q #20: Open-Ended Response											Q #21: Response	Q #22: Response	
6522590631	Building maintenance. Dealing with contractors and trades													
6521812254	Paying the bills.			C				B				Hate it	30-50%	40
6524458422	personnel...										IIR	Neutral	30-50%	40
6521801312	Maintenance issues and personnel issues										IIR	Neutral	30-50%	40
6523480712	Financial Forms and Proper Documentation				REGS							Neutral	30-50%	40
6521628688	Business management											Neutral	30-50%	40
6573385058	All categories are mixed together or individually											Neutral	30-50%	40
6521825280	Personnel.										IIR	Love it	50-80%	65
6523495646	Gathering Data about parish needs i.e. what parishioner needs are and demographic trends to help prepare for the future												30-50%	40

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		S	M	C	REGS	LGL	F	B	I	IIR				
6522333565	Q #20: Open-Ended Response Personnel: inherited wrong people for their roles but longevity prevents termination and lack of financial resources prevents hiring additional people with proper skill set to achieve proper mix.			C					L	IIR	Hate it	50-80%	65	
6531792116	Making a budget that depends on the generosity of the parishioners.			C			F				Neutral	10-30%	20	
6550127493	Working within an outdated system										Hate it	50-80%	65	
6531578176	School issues. dealing with parents who do not understand what a Catholic school is	S									Neutral	10-30%	20	
6524958307	Evaluating which person is needed for each role by understanding new creative ways of distributing workload according to a pastoral plan.													
6522751235	Dealing with personnel								L	HR	Neutral	10-30%	20	
									L	HR	Neutral	10-30%	20	

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		S	M	C	REGS	LGL	F	B	I	L	IIR			
6521348553	Q #20: Open-Ended Response Human Resources Personnel. Hiring and firing are very difficult because our current laws and procedures are complicated. The hardest thing I had to do as a pastor was let a book keeper go.											Love it	30-50%	40
6550028182	personell - hiring, motivating, evaluating, compensation. All are most important for building a community of service to the parish. I would say I have been lucky rather than good in making these decisions.				REGS					L	IIR	Love it	30-50%	40
6529001872	Managing Finanees and preventative maintenance of the plant/buildings.									L	IIR	Love it	30-50%	40
6525268202	Personnel issues						F	B				Neutral	30-50%	40
6524093260											IIR	Love it	30-50%	40

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		S	M	C	REGS	LGL	F	B	T	L	IIR			
	Q #20: Open-Ended Response											Q #21: Response	Q #22: Response	
6523549109	Right now, evaluating maintenance staff. I need to upgrade their attitude and work habits. Or get rid of them.									L	IIR	Neutral	30-50%	40
6522498688														
6523047061	Compliance with government and diocesan rules and regulations. Maintenance and upkeep of the aging property.				REGS			B				Neutral	30-50%	40
6523398474	Balancing the day to day operations of work, prayer, and budgets								T			Neutral	10-30%	20
6523266148	It is personal. I am a very sensitive person. I am more of a counselor or a healer. Sometimes you need somebody who is more objective.													
6549656947	human resources											Neutral	10-30%	20
6522278022											IIR	Neutral	30-50%	40

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		S	M	C	RLGN	LGL	I	B	F	L	IIR			Q #21: Response	Q #22: Response
6539058044	Q #20: Open-Ended Response Personnel. There are many personalities, personal traits, and visions to try and balance. Personnel - especially those in support positions e.g. maintenance. When you get a good person, it's great, but often those less motivated but willing to accept the salary we can offer, present some very problematic situations and take an inordinate amount of time to deal with.														
6550738623	New challenges that I have never encountered before														
6522074722	Personnel problems - giving direction where needed and not offending or creating a larger problem(s)														
6524084434	Dealing with conflict and personnel management														
6523874789															

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		S	M	C	REGS	LGL	F	B	T	L	HR			
6522253880	Q #20: Open-Ended Response													
	Managing personnel...evaluation, goals, firing, conflicts									L	HR	Neutral	30-50%	-10
6522420516	Dealing with various personalities on staff. We've had to work a lot lately at team development, unity and a common vision. We asked a business coach for assistance and he's been a blessing to help bring a greater unity among the staff.													
	Personnel. Hiring/firing are infrequent, but draining and time-consuming. Evaluations also take time in a large parish. Keeping staff from fussing with each other. Understanding their own roles and each other's roles.									L	HR	Neutral	30-50%	40
6551338247										L	HR	Neutral	30-50%	40

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		S	M	C	REGS	LGL	F	B	T	I	IIR	Q #21: Response		Q #22: Response	MIDPOINT OF RANGE
6526412841	Q #20: Open-Ended Response dealing with so many legal matters					LGL						Neutral	10-30%	20	
6521505747															
6549383914	Dealing with different personalities.									L	IIR	Neutral	30-50%	40	
	Being in charge of a school owing to the great diversity of what families want and the lack of school leadership we really want														
6522813050		S								L		Love it	30-50%	40	
6550893375	persons not following policy									L	IIR	Neutral	30-50%	40	
6522456463	Personnel management									L	IIR	Neutral	30-50%	40	
6521713643	government/diocese regulations				REGS							Neutral	10-30%	20	
6521856338	Human resource administration.									L	IIR	Love it	30-50%	40	
6522476424	Regulations of state and church programs and mandates				REGS							Neutral	10-30%	20	
6549467101	Building maintenance. Lots of time consumed.							B				Neutral	More than 80%	90	

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		S	M	C	REGS	LGL	F	B	I	L	HR	Q #21: Response				Q #22: Response
6524662690	Q #20: Open-Ended Response Finances - can't always count on contributions Capital campaigns. The people are asked for too much money too often			C			F						Hate it	30-50%		40
6533796396	Personnel problems			C								HR	Neutral	30-50%		40
6539619084	Maintenance Issues							B					Hate it	50-80%		65
6522555828	working within a realistic budget												Neutral	30-50%		40
6522873024	Difficult people and communication with everyone			C			F						Neutral	50-80%		65
6521965457	Personnel - its difficult blending personalities												Neutral	30-50%		40
6550741302												L	Love it	10-30%		20
6522595878												L	Neutral	50-80%		65
6571566362																
6549678498																
6549439045																
6549394707																
6523221692																
6522598257																

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Respondent ID	Q #20: In your opinion, what is the hardest or most challenging area of parish administration and why? Please be specific with your comments.	CATEGORY OF #20 (KEY: S=SCHOOL, M=MENTORING/TRAINING SUPPORT, C=COLLECTIONS-FUNDRAISING, REGS= DIOCESAN GOV'T, LGL=LEGAL, F=FINANCES, B= BUILDINGS REAL ESTATE, T= TIME MANAGEMENT, L= LEADERSHIP, HR= HUMAN RESOURCES)												Q #21: How do you now feel about parish administrative tasks (financial, fundraising, planning, building/grounds maintenance, etc.)	Q #22: What percentage of your time, on average, do you now personally spend on administrative tasks? Do not include the time that others on your staff spend on administrative tasks.	
	Q #20: Open-Ended Response	S	M	C	REGS	LGL	F	B	T	L	HR			Q #21: Response	Q #22: Response	MIDPOINT OF RANGE
		3	2	8	5	1	7	7	2	20	31			SUM OF MIDPOINT VALUES		2,700.00
		TOTAL TOTAL TOTAL TOTAL TOTAL TOTAL TOTAL TOTAL TOTAL TOTAL TOTAL TOTAL											AVERAGE OF MIDPOINT VALUES	41,538.615		

NB: Fields highlighted in grey are the author's additions, calculations, or adjustments.

Appendix D

“Doing the Laundry, Dusty Shoes, and the Church Bell: Servant Leadership Lessons from Pope Francis”

Keynote Address Delivered by Chris Lowney

National Association of Diaconate Directors
Annual Convention

April 13-15, 2016
Westin Oaks at the Galleria
Houston, Texas

Summary Prepared By:
Marie J. Kushner

In Partial Fulfillment for the Degree
Doctor of Ministry

St. Mary Seminary and Graduate School of Theology
Diocese of Cleveland

Introduction

I accompanied my husband, David, the last few years, to the annual National Association of Diaconate Directors (NADD) convention. The NADD supports member U.S. and Canadian dioceses and eparchies in their work of formation, ministry, and life of deacons and is based in Columbus, Ohio. The convention is hosted by a different diocese each year. In past years, we have been to Albuquerque, Atlanta, and Minneapolis. This year the convention was held in Houston from April 13 through April 15. Given that the theme was, “Deacon: Servant Leader in a Servant Church,” I signed up to go to the keynote address and the three general sessions. Chris Lowney, author of *Heroic Leadership* and *Pope Francis: Why He Leads the Way He Leads; Lessons from the First Jesuit Pope*, delivered the keynote address and led the first general Session. Fr. Robert Spitzer led the second general session and Mrs. Kerry Robinson led the third. Below is the summary of Chris Lowney’s presentation as well as my own impression of the session as it relates to my Doctor of Ministry project on church administration.

Keynote and General Session 1

Before beginning, Chris outlined what he planned to cover in his presentation to our group. His intention was to discuss an understanding of leadership, the spirituality of leadership, and to offer Pope Francis as an icon of leadership. He further noted that once upon a time, leadership was embodied in a person. Leadership now, he stated, is a behavior. His thesis is that as the world becomes faster paced and more complex, we all need to step up as leaders.

He began by polling the room’s confidence level in political, business, education, and religious leaders through a show of hands. Religious leaders (the “home team”) had

the greatest number of votes and politicians received none. Not surprising since the room was filled with clergy. In a 2007 survey of Americans conducted by Yankelovich, Inc., only 10% responded that they had a great deal of confidence in Wall Street and Congressional leaders. Business leaders came in with 15% and education and religious leaders had 20%. The survey of hands and the one conducted by Yankelovich plainly point to a leadership crisis. Chris then asked for examples of good leaders and people in the room responded with Mother Theresa, Cardinal Wuerhl, and others. All of these people are or were famous leaders with large leadership platforms. As a follow up, he asked for the personal qualities or attributes of good leadership. The list produced by our group included service, transparency, decisiveness, inclusivity, and dignity. This, of course, begged the question, what in the list was the exclusive characteristic of a world leader? In fact, Chris pointed out, we are all called to model these attributes. The first leaders that we need to think about are ourselves. He stated that we are all leading all the time, we just have different leadership platforms. Each person has a leadership responsibility. Given the meeting context (NADD), he reminded us that we have all been baptized into Christ's priestly, prophetic, and kingly role.

As leaders, we "point the way" by example and with love. He reminded us of the words of Albert Schweitzer, "Example is not the main thing in influencing others; it is the only thing." As for love, he quoted Gen. Eric C. Shinseki, retired Army Chief of Staff, "You must love those you lead before you can be an effective leader." An internet search produced the rest of the quotation from the June 11, 2003 New York Times article, "Retiring Army Chief of Staff Warns Against Arrogance," written by Thom Shanker, "You can certainly command without that sense of commitment, but you cannot lead

without it. And without leadership, command is a hollow experience, a vacuum often filled with mistrust and arrogance."

As leaders that "point the way," we must aim for "whole life" thinking. We have only one life and to live different styles of life, depending on our context, i.e. a "religious life" versus a "work life," is cause for stress and the modeling of a split life. Chris quotes Teilhard de Chardin's Hymn of the Universe. "God is not remote from us...On the contrary, at every moment he awaits us in the activity, the work to be done...He is, in a sense, at the point of my pen, my pick, my paint-brush, my needle-and my heart and my thought." We must live integrated and not compartmentalized lives. To be holy is to be whole.

Leadership is not about tactics or tricks. Chris noted that there is a spirituality of leadership. Great leaders serve others, are "in touch," have a daily habit of reflection, and are internally "free."

Chris Lowney's keynote address was entirely consistent with his writings and offered a perspective on leadership that was undeniably practical: we are all called to lead. By virtue of baptism, all are called to share in the mission of the Church.

Annotated Bibliography

Administration

Barker, Alex. "Church finances: Holy disorder." *Financial Times*. January 21, 2014. <http://www.ft.com/intl/cms/s/0/7ce00cc6-7def-11e3-95dd-00144feabdc0.html#axzz3wcOKMvdl> (accessed July 25, 2015).

The financial collapse of the Archdiocese of Maribor (a city of 114,000 people) is one of the biggest of the modern Church with claims potentially reaching 1 billion EUR (\$1.35 billion US) at the time of writing. Investment funds with speculative holdings, poor oversight, and aggressive borrowing led to the bankruptcy. It paralleled what happened with the Slovenian economy as a whole. In the end, it was pornography that alerted the Vatican to a problem. The savings of small people were recklessly squandered, three bishops were ousted, and a priest went to jail. Too much trust was placed on a priest with little financial expertise and, apparently, too much hubris.

Benson, Bruce D. "Giving College Administrators a Business Education." *The Wall Street Journal*. August 27, 2015. <http://www.wsj.com/articles/giving-college-administrators-a-business-education-1440628508> (accessed August 28, 2015).

Fifty years of business experience taught Bruce Benson, president of the University of Colorado, the measures needed to reduce costs in the face of significantly reduced state funding for higher education. He took a three-prong approach: implement efficiencies, increase new revenue, and build collaboration. "If public institutions want to remain a viable option for all students, they must learn to operate more like businesses..."

Boone, Larry W., Ph.D., Mary Ann Dantuono, J.D., Margaret John Kelly, D.C., Ph.D., Brenda Massetti, Ph.D., and James W. Thomson, Ed.D., CPA. *A Concise Guide to Catholic Church Management*. Edited by Kevin E. McKenna. Notre Dame: Ave Maria Press, 2010.

Its aim is not technical expertise but to convey an understanding of the basics of specialized vocabularies. Its topics include leadership, management, communication, meetings, customer service, performance evaluation, human resources, legal principles, and stewardship.

Brunner, Charles. "Expanding Your World: Leveraging Core Competencies to Drive New Growth Opportunities." *Product Genesis*. 2006. http://www.productgenesis.com/archive/PG_Report_Expanding_Your_World_0601.pdf (accessed January 7, 2016).

An article geared toward business sales growth. There is a take-away for the Church with respect to core competencies. "...Taking stock of what you know, what you are willing to learn, the risks you are willing to accept along the way, your goals and desired outcomes." (p. 4).

Catholic News Agency. "Slovenia's two archbishops resign amid financial crisis."

Catholic News Agency. August 1, 2013.

<http://www.catholicnewsagency.com/news/slovenias-two-archbishops-resign-amid-financial-crisis/> (accessed July 25, 2015).

Poor financial decisions led to a financial meltdown and the resignations of three archbishops; two resigned at the invitation of Pope Francis.

Conway, Daniel, project director. *The Reluctant Steward. A Report and Commentary on The Stewardship and Development Study*. Principal resource persons: Anita M. Rook and Daniel A. Schipp. Edited by Cecelia Hart Price. Indianapolis, IN and St. Meinrad, IN: Christian Theological Seminary and St. Meinrad Seminary, 1992.

Collaborative research project that studied the ways that U.S. and Canadian Catholic and Protestant churches prepared current and future leaders for stewardship of human, physical, and financial resources. Study indicated that clergy feel inadequately prepared for administrative work and, at the same time, do not have a strong interest in learning more through continuing education. There was also a great degree of uncertainty among seminaries about their role in responding to the need for administrative training. It is inescapable, however, that leaders need to know enough to be comfortable overseeing the administrative affairs of their churches to ensure growth and vitality. This publication includes not only the details of the conduct of the project, but also several individuals' observations regarding stewardship. Among their insights: the need for a theology of stewardship that is more broadly articulated than "time, talent, and treasure," the development of a spirituality of giving, seminaries must make stewardship a top priority, there are ranges of leadership styles, and successful administration is the foundation of successful mission.

Conway, Daniel, project director. *The Reluctant Steward Revisited. Preparing Pastors for Administrative and Financial Duties: A Report and Commentary on a Study Conducted by Saint Meinrad School of Theology with funding from Lilly Endowment Inc.* St. Meinrad, IN: St. Meinrad School of Theology, 2002.

This study reveals that some of the ambivalence about the relationship of administration and pastoral ministry among pastors remains and much of the uncertainty among seminaries about their roles in responding to the perceived needs of pastors in the areas of administration and finance remains. Conway indicates, "In spite of their ambivalence, I think that seminaries need to take the lead...in developing academic and extracurricular programs that can address the full range of knowledge and skills needed to be successful in pastoral ministry today." (p. 34)

Doering, E. Jane. "Workplace Philosopher: What would Simone Weil make of the way we work today?" *America: The Jesuit Review*. September 12, 2016. <https://www.americamagazine.org/issue/workplace-philosopher> (accessed March 8, 2018).

The spiritual values of work are those that hone the human capacity for attention, love of neighbor, and understanding limits. The virtue of attention is the purest form of prayer. Weil believed that attention is the only faculty that gives us access to God and the purest form of prayer. "Work that requires thought before action-mindful attention given to solving a problem at hand-is the best vehicle for that apprenticeship." (p. 3) Work allows one to participate in God's creative activity.

The Economist. "Earthly concerns." *The Economist*. August 18, 2012.

<http://www.economist.com/node/21560536/print> (accessed January 5, 2016).

The Church suffers from questionable financial management, fraud, and embezzlement. This malfeasance would have been cause for widespread resignations at the top of any other public institution. *The Economist* estimated that the Church and her entities spent \$170 billion and employed 1 million people in 2010: 57% to health care networks, 28% to colleges, 6% for parishes and diocesan operations, and 2.7% to national charitable activities. For comparison purposes, General Electric's revenues in 2010 were \$150 billion and Walmart employs 2 million people. The Church is the largest single charitable organization in the country and as big as any company in America. The call is out for the Church to manage her finances capably and with more transparency and accountability.

The Economist. "Earthly concerns." *The Economist*. August 16, 2012.

<http://www.economist.com/node/21560478/print> (accessed January 5, 2016).

"Back-of-the-envelope" calculation of the American Church's national operating budget that was referenced in the "Earthly concerns" article published August 18, 2012.

Francis. Presentation of the Christmas Greetings to the Roman Curia." 22 December 2014. The Holy See.

https://w2.vatican.va/content/francesco/en/speeches/2014/december/documents/pa-pa-francesco_20141222_curia-romana.html (accessed May 10, 2016).

In no uncertain terms the Pope counsels the Curia to take the time to give thanks and to seek forgiveness. "The Curia is called constantly to improve and to grow in *communion, holiness and wisdom*, in order to carry out fully its mission." He exhorts to be mindful of temptations (curial diseases) which weakens service to the Lord (he includes himself in his choice of language): thinking that one is immortal, immune or indispensable; excessive busy-ness; loss of human sensitivity (hearts of stone); excessive planning and functionalism; poor coordination; loss of spirituality (spiritual Alzheimer's); rivalry and vainglory; leading a double life; gossiping, grumbling, and back-biting; idolizing superiors; indifference to others; lugubrious faces; hoarding; closed circles; and worldly

profit and self-exhibition. These temptations are a danger for every Christian and every kind of community, including our own parishes, and should be used as an examination of conscience.

Francis. Visit to the Joint Session of the United States Congress. 24 September 2015. The Holy See.

https://w2.vatican.va/content/francesco/en/speeches/2015/september/documents/papa-francesco_20150924_usa-us-congress.html (accessed October 12, 2015).

Pope Francis takes the opportunity to comment on the dignity of work and to quote from *Laudato Si'* about the vocation of business. "Business is a noble vocation, directed to producing wealth and improving the world. It can be a fruitful source of prosperity for the area in which it operates, especially if it sees the creation of jobs as an essential part of its service to the common good."

Gibson, David. "Not just theology: Catholic seminarians go to summer school to learn management skills." *The Washington Post*. July 7, 2014.

https://www.washingtonpost.com/national/religion/not-just-theology-catholic-seminarians-go-to-summer-school-to-learn-management-skills/2014/07/07/58dfd33e-05fc-11e4-a7ef-9ed5d8510e81_story.html (accessed January 3, 2016)

The study of parish budgets as "operative theology." Financial statements are theological statements that set forth a parish's priorities. Villanova University launched a five-week course in 2013, Seminarian Leadership Institute, targeted to new priests. Charles Zech pushed for this program for 10 years. His prime motivators were stories of fraud and embezzlement and the looming priest shortage. Eleven men participated in the summer of 2014: 5 from the Philadelphia archdiocese, 3 from Allentown, 2 from Wilmington, and 1 from Camden. Auxiliary Bishop Timothy Senior and rector of St. Charles Borromeo Seminary in Philadelphia noted that the top reason that priests seek re-assignment is to get out from under heavy administrative burdens. He is hoping for parish operational efficiencies.

Glatz, Carol. "Slovenian archbishops resign because of ties to financial collapse." *National Catholic Reporter*. August 1, 2013.

<https://www.ncronline.org/print/news/global/slovenian-archbishops-resign-because-ties-financial-collapse> (accessed January 7, 2016).

The archbishop of Ljubljana, Anton Stres, tendered his resignation to Pope Francis, who in turn accepted it. "He said he accepted partial blame for the disaster, but he said full responsibility should be on the holding companies that mismanaged the money, resulting in losses for the archdiocese of Maribor." This article put the loss at about 700m euros.

Hannum, Kristen. "Five habits of highly effective parishes." *U.S. Catholic* 79, no. 3 (March, 2014): 12-17.

The title of this article is an obvious riff on Stephen Covey's writing. The author's five key strategies: make a good first impression (greeters and physical

spaces), metrics matter (keeping track of results), faith formation is a family affair (Catholics that are intentionally Catholic), plucking people from the pews (involvement), and communicate the right message (interaction).

Hannum, Kristen. "The parish that works: Business practices for the church." *U.S. Catholic* 76, no. 7 (July, 2011): 12-17.
<http://www.uscatholic.org/church/2011/05/parish-works-business-practices-church> (accessed October 12, 2015).

"Synergy, efficiency, and compliance aren't just for business." Churches are to be responsible stewards by responsible use of resources. Best practices that translate from the business sector are transparency, accountability, planning, financial protocols, decision-making, collaboration, performance evaluation, leadership (servant-leader model), and communication (consult, decide, inform). In the church setting, they must be applied theologically. Efficiency dominates the business world. In the nonprofit world, efficiency must be balanced with relationships and mission. Partnering with laity frees priest to be about pastoral ministry. The goal is to effectively and efficiently utilize parish resources in service to the mission of the church.

Harvard Business Review. *HBR's 10 Must Reads on Emotional Intelligence*. Boston: Harvard Business Review Press, 2015.

Harvard Business Review's essential readings on the topic of emotional intelligence. This collection of articles covers topics on leadership, mood, process fairness, group dynamics, resilience, and incivility. Contributors include Daniel Goleman and (Cleveland's own) Richard Boyatzis.

Heisig, Eric. "Former Catholic Charities controller sentenced to five years in prison for embezzling \$2 million." *cleveland.com*. May 18, 2017.
http://www.cleveland.com/court-justice/index.ssf/2017/05/former_catholic_charities_cont.html (accessed September 8, 2017).

This substantial sum of money was stolen between 2008 and 2016, an average of \$250,000 per year. Michelle Medrick wrote checks payable to "cash" over 1,000 times. She was employed by Catholic Charities for about 27 years. It took her next employer less than a year to catch up to the fraud she perpetrated there.

Holmes, Paul A., ed. *A Pastor's Toolbox: Management Skills for Parish Leadership*. Collegeville, MN: Liturgical Press, 2014.

Anthology of writings by leaders/experts in varying fields of business/parish management. Recommendations and reflections on leadership, human resources, risk management, internal financial controls, fundraising, etc. are excellent. Insufficient in terms of practical applications (there are only three in Appendices A-B).

Holmes, Paul A., ed. *A Pastor's Toolbox 2: More Management Skills for Parish Leadership*. Collegeville, MN: Liturgical Press, 2017.

A second anthology of guidance written by leaders/experts in various fields of work. This second work covers additional topics that the first volume did not, including pastoral and finance councils, vision development, running meetings, communications, team building, and wellness. Still, there is not much in the way of concrete examples.

Jorisch, Avi. "The Vatican Bank: The Most Secret Bank In the World." *Forbes*. June 26, 2012. <https://www.forbes.com/sites/realspin/2012/06/26/the-vatican-bank-the-most-secret-bank-in-the-world/#127ae2ea120b> (accessed March 7, 2018).

The Vatican Bank has been embroiled in serious financial scandals, including money laundering. A Vatican account was closed in Milan by JP Morgan Chase because of a lack of response to questions regarding transfers of money.

Keller, Bill. "Catholicism Inc." *The New York Times*. February 17, 2013. http://www.nytimes.com/2013/02/18/opinion/keller-catholicism-inc.html?_r=0 (accessed January 7, 2016).

What may the Catholic church learn from the business world? Begin by restoring the trust of the faithful and the respect of the general public by dealing with the legacy of past disgrace. Purge those responsible for abuses, provide unstinting disclosure to investigators, and appoint a compliance officer. Looking to the future, consideration should be given to strategy, local latitude, recruiting, joining the digital world, and public relations.

Koniers, Deacon Bill. "The Business of the 21st Century Catholic Church: Technology Can Help Manage the Business of the Church Without Turning the Church into a Business." CathoNet. 2013. <http://www.cathonet.com/pdfs/TheBusinessOfThe21stCenturyCatholicChurch.pdf> (accessed September 8, 2015).

"...Our Church Leadership is recognizing the need to sharpen her management skills and to leverage technology that can provide the standardization of best practices and processes that will provide information in virtual real time." Words that need to continue to become a part of the language of those responsible for supporting the mission of the Church: cloud technology, data analytics, metrics, and risk management. Leadership should seek to achieve transparency and accountability to parishioners and other parties (bankers, insurance agents, etc.).

Kropko, M.R. "Former top Cleveland church accountant convicted." *Ohio.com*. July 3, 2008. <https://www.ohio.com/akron/news/former-top-cleveland-church-accountant-convicted> (accessed March 2, 2018).

Former CFO portrayed as a manipulator who arranged \$785,000 in kickbacks and secret payments because he felt underpaid. The Church responded that it was a victim and unaware of financial wrongdoing.

Leadership Roundtable. *Catholic Standards for Excellence*. Maryland Association of Nonprofit Organizations, DBA Standards for Excellence Institute, offered under licensing agreement through the National Leadership Roundtable on Church Management, 2007-2012.

Signature-ready presentation of ethical and accountable practices for Catholic parishes.

Leadership Roundtable. *Standards for Excellence: An Ethics and Accountability Code for Catholic Dioceses*. Maryland Association of Nonprofit Organizations, DBA Standards for Excellence Institute, offered under licensing agreement through the National Leadership Roundtable on Church Management, 2007.

Signature-ready presentation of ethical and accountable practices for Catholic dioceses.

Martin. "Core competencies: An overview." *Cleverism* (formerly, Entrepreneurial Insights.) May 13, 2014. <http://www.cleverism.com/core-competencies-overview/#more-808> (accessed January 7, 2016).

Core competencies are the collective learning of an organization that are enhanced over time. Organizations that have identified their core competencies are capable of creating more value through the leveraging of organizations' resources. Core competencies are those that provide major differentiation from other organizations, pervade the organization, and are hard to imitate.

Martin, James, SJ. "Why the Church Needs Business." *America: The National Catholic Weekly*. December 19, 2013. <http://americamagazine.org/content/all-things/why-church-needs-business> (accessed September 3, 2015).

Fr. Martin applauds that the Vatican has hired McKinsey & Co. to review communication strategies and KPMG to review accounting practices. When asked for ideas and input into Jesuit training, Fr. Martin suggested that a year of philosophy be dropped and a year of business added. Good management is good stewardship.

McClory, Robert J. "Collection racket." *USCatholic.org*. April 14, 2009. <http://www.uscatholic.org/church/2009/04/collection-racket> (accessed March 7, 2018).

A random search of news sources for stories pertaining to Catholic Church embezzlements produced 12 cases in July, 2008. One of the 12 was the story of the former CFO of the Catholic Diocese of Cleveland who netted \$750,000 in an elaborate kickback scheme. It is a serious problem that damages the credibility and moral authority of the Church. Internal controls and accountability are key to problem resolution. Another recommendation is disclosure via IRS Form 990.

Mckenna, Josephine. "Vatican financial watchdog signs accord with U.S. Treasury Department." *The Washington Post*. June 30, 2014. <https://www.washingtonpost.com/national/religion/vatican-financial-watchdog->

[signs-accord-with-us-treasury-department/2014/06/30/223101b6-0091-11e4-b203-f4b4c664cccf_story.html?utm_term=.bda0dcbcdf61](https://www.fda.gov/oc/2014/06/30/223101b6-0091-11e4-b203-f4b4c664cccf_story.html?utm_term=.bda0dcbcdf61) (accessed March 2, 2018).

Bilateral accord signed in order to tackle corruption and increase transparency. “The Vatican watchdog expects further agreements with financial supervisors and regulators around the world as it strengthens its own regulatory infrastructure in the fights against money laundering and the financing of terrorism.” (p. 2)

Rocca, Francis X. “Business Leaders Court Vatican.” *The Wall Street Journal*. January 19, 2016. <http://www.wsj.com/articles/business-moves-to-strengthen-vatican-ties-1453157586> (accessed January 19, 2019).

During a meeting in January, 2016, business leaders sought common ground with Pope Francis, who has supported the rights of workers at the expense of the entrepreneur. Addressing the attendees, Cardinal Pell noted, “Market economies have brought unprecedented prosperity and represent, despite their many faults and deficiencies, an extraordinary human achievement.”

Rohr, Richard. *A Lever and a Place to Stand: The Contemplative Stance, the Active Prayer*. Mahwah, NJ: HiddenSpring, 2011.

Archimedes, Greek mathematician and philosopher, noted that levers, balanced in the right place and on the right fulcrum, could move disproportionate amounts of weights versus the force actually applied. This same thought is applicable to people’s unique skill sets and why they should be identified and leveraged to the greater good.

Rossi, Albert Ph.D. and Julia Wickes, MA. “Time Management: an Orthodox Perspective.” Orthodox Church in America. September 15, 2009. <https://oca.org/parish-ministry/theology/time-management-an-orthodox-perspective> (accessed August 2, 2015).

Time is not our own. Time belongs to God. Although time is not ours to manage, so much as God’s, we must, nevertheless, use skill and prudence in how the gift of time is used. The Lord must flow through our plans and work through us.

Tobin, Mike. “Former Bishop Pilla testifies in kickback trial.” *cleveland.com*. May 29, 2008.

http://blog.cleveland.com/metro/2008/05/former_bishop_pilla_testifies.html (accessed March 7, 2018).

An anonymous letter sent to the bishop and to The Plain Dealer accused the former CFO of the Diocese of Cleveland of financial irregularities. “‘I am not an accountant.’ he (*sic*) said. ‘I am not a business person. I’m a pastor.’” (p. 1)

U.S. Catholic interview. "Laypeople are creating a blueprint for the church's success." *U.S. Catholic* 80, no. 10: 28-32 (October, 2015).
<http://www.uscatholic.org/articles/201510/laypeople-arc-creating-blueprint-churchs-sucess-30396> (accessed October 12, 2015).

Interview with Kerry Robinson, executive director, of National Leadership Roundtable on Church Management. The National Leadership Roundtable (now the Leadership Roundtable) is focused on the temporal affairs of the Church, including "the management of people, facilities, finances, communications, and technology." Kerry Robinson brings together business and ministerial leadership to develop best practices for the church. Transparency and accountability are also key.

United States Conference of Catholic Bishops. "Diocesan Internal Controls: A Framework." USCCB. Washington, DC, 1995.
<http://www.usccb.org/about/financial-reporting/diocesan-internal-controls-framework.cfm> (accessed June 5, 2015).

Canon Law addresses the responsibilities of bishops as administrators of the Church's temporal goods. Fraud perpetrated by clergy, employees, and volunteers of the Church is frequent and severe. This document discusses basic elements of internal control: honest and capable employees, delegation and separation of duties, and physical control over assets and accounting records. This document should be a, if not the, foundational document of a financial management class or training program.

United States Conference of Catholic Bishops. "Diocesan Financial Issues." USCCB. Washington, DC, 2002. <http://www.usccb.org/about/financial-reporting/upload/Diocesan-Financial-Issues-Manual.pdf> (accessed September 4, 2015).

Intended as a document that addresses and offers best practices with respect to financial matters as they specifically pertain to dioceses and religious institutions. It is comprehensive and thorough. Its sources are impeccable (AICPA, etc.) and the sample documents are excellent. Another foundational document for teaching or training.

West, Melanie Grayce. "N.Y. Archdiocese Unveils Church-Management Program." *The Wall Street Journal*. March 10, 2015. <http://www.wsj.com/articles/n-y-archdiocese-unveils-church-management-program-1426007722> (accessed August 10, 2015).

The Archdiocese of New York is launching a two-year online program that will give the laity a formal training in church management in partnership with Villanova University. Tuition is to be subsidized by the archdiocese and individual parishes seeking to hire trained managers. Cardinal Dolan is seeking to liberate his clergy to do more pastoral work.

Zech, Charles. "White Paper on US Catholic Parish Management: Building the Parish Business Model for the 21st Century." Villanova University.
<https://www1.villanova.edu/content/dam/villanova/VSB/centers/church/21conference/White%20Paper%20on%20US%20Catholic%20Parish%20Management%20-%20Chuck%20Zech.pdf> (accessed September 8, 2015)

Author identifies trends requiring a new parish business model: decline of vocations, migration of Catholics, ethnic diversity, low giving, and declining participation. Solutions offered: elliptical parish organization chart, professional performance management, parish performance metrics and analytics, co-responsibility vs. volunteerism, parishioner relationship management, and technology. "The Church...does have a stewardship responsibility to use the scarce resources that are available to it as effectively (and efficiently) as possible to carry out God's work on earth."

Zech, Charles E. "Best Practices in Parish Internal Financial Controls." In *A Pastor's Toolbox: Management Skills for Parish Leadership*, edited by Paul A. Holmes, 73-83. Collegeville, MN: Liturgical Press, 2014.

An item low on the list of priorities is the issue of internal controls for the prevention of fraud. It is not very well understood but extremely critical to the stewardship of a parish.

Zech, Charles E., ed. *The Parish Management Handbook*. Mystic, CT: Twenty-Third Publications, 2003.

An anthology of articles by different authors covering the topics of local theology of church management, pastoral councils, decision making, civil law, pastoral leadership, stewardship, and conciliation. Michael Cieslak notes that parishes take on the quality of a pastor's leadership and the consequences thereof in his article, "The Consequences of Pastoral Leadership."

Leadership

Bernstein, Elizabeth. "Why Introverts Make Great Entrepreneurs." *The Wall Street Journal*. August 24, 2015. <http://www.wsj.com/articles/why-introverts-make-great-entrepreneurs-1440381699> (accessed August 25, 2015).

Introverts have unique skills that may make them better suited for entrepreneurial and business success than extroverts. These skills include, "...the ability to focus for long periods, a propensity for balanced and critical thinking, a knack for quietly empowering others..." Introverts don't generally need external affirmation, are better listeners, and tend to be more realistic. Bill Gates and Warren Buffett are widely thought to be introverts.

Covey, Stephen R. *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change*. New York: Simon & Schuster, 2004.

The focus is on the character ethic (and not the personality ethic) as the foundation of success. There are principles (not values) that govern human effectiveness. These principles are fundamental truths having universal

application. Human character is a composite of habits that are at the intersection of knowledge, skill, and desire. The author begins with the three habits of the person: personal vision (be proactive), personal leadership (begin with the end in mind; living a principles-centered life), and personal management (put first things first). He then moves to the interpersonal: interpersonal leadership (think win/win), empathetic communication (seek first to understand and then seek to be understood), and creative cooperation (synergy). Throughout is a seventh habit that feeds and energizes the others: self-renewal. This book is packed with excellent advice that may be implemented on a personal or organizational level.

Francis. Meeting with the Bishops of the United States of America. 23 September 2015. The Holy See.

https://w2.vatican.va/content/francesco/en/specches/2015/september/documents/papa-francesco_20150923_usa-vescovi.html (accessed November 18, 2016).

Speaking as, “a brother among brothers,” Pope Francis offered the character and qualities of a bishop to the bishops gathered in Washington, D.C. The heart of the identity of a bishop is in prayer, preaching, and shepherding. It is a prayer that is a familiar union with Jesus. A preaching that joyfully proclaims Christ crucified and risen (and not complicated doctrines.) Shepherds that are always watchful and oriented to the “other.” Bishops promote the culture of encounter through the method of dialogue. He cautioned that harsh or divisive language does not befit the tongue of a pastor. “Certainly it is helpful for a bishop to have the farsightedness of a leader and the shrewdness of an administrator...”

Frankl, Victor E. *Man's Search for Meaning*. Boston: Beacon Press, 2006.

A gem of a book written by a Holocaust survivor. The true meaning of life is found in the world and not in oneself: a work or deed; experiencing something or encountering someone; and by the attitude taken toward unavoidable suffering. A person's main concern is to see meaning in his/her life. The meaning of life changes. A person always chooses his or her attitude in any given circumstance, even in situations of unimaginable suffering or hardship. “The salvation of man is through love and in love.” (p. 37)

Goleman, Daniel, Richard Boyatzis, and Annie McKee. *Primal Leadership: Realizing the Power of Emotional Intelligence*. Boston: Harvard Business School Press, 2002.

This book explores the role of emotional intelligence in leadership. Leaders excel with skill, intelligence, and with emotional intelligence competencies that are generally acquired: self-awareness, self-management, social awareness (empathy), and relationship management. The emotional task of a leader is primal, that is, original and the most important act of leadership. In groups the leader has the maximal power to sway people's emotions. A resonant leader is attuned to people's feelings and is able to move them in a positive emotional direction. “Our basic argument, in a nutshell, is that primal leadership operates at its best through emotionally intelligent leaders who create resonance.” (p. 38) Resonance is the key to primal leadership. Leaders are able to skillfully

switch between various styles of leadership as the occasion warrants: visionary, coaching, affiliative, democratic, pacesetter, and commanding.

Jacobs, Richard M., OSA, Ph.D. "Aristotle: Character as the Basis of Leadership." Villanova University. <http://www83.homepage.villanova.edu/richard.jacobs/MPA%208300/theories/Aristotle.html> (accessed October 30, 2015).

For Aristotle virtue and virtuous character are foundational for individuals to deal with important matters of people. Leadership, therefore, is all about character and virtue. Further, it is more a matter of art and prudence than science, wisdom, and understanding.

Koch, Carl. "Servant Leadership." *America: The National Catholic Weekly*. July 5, 2004. <http://www.americamagazine.org/issue/article/servant-leadership> (accessed August 3, 2015).

Servant leadership is leadership that emphasizes service as a priority. It is rooted in the person of Jesus. Consider John 13:13-17. Key is trusting relationship. The characteristics of a Jesus-like servant leader (described by Robert Greenleaf): listening, empathy, awareness, healing, persuasion, conceptualization, foresight, commitment to the growth of people, building community, and stewardship. Arguably, stewardship encompasses all of the listed characteristics. "Servant leaders give account and expect to be held accountable...Stewards empower others because they realize their interdependence with all humanity, all God's creatures and the holy earth."

Lowney, Chris. *Everyone Leads: How to Revitalize the Catholic Church*. Lanham, MD: Rowman & Littlefield, 2017.

Chris Lowney proposes that the Church's challenges have snowballed into the worst crisis in five centuries, given the priest shortage, declining Catholic practice, and many that have left the Church altogether. He proposes a revitalization strategy that everyone can understand and to which all can contribute and calls it our "EASTeR project." For the Church to be more Entrepreneurial and Accountable and having action priorities of Service to the poor and marginalized, Transformation of members' hearts and souls, and Reaching out to engage and welcome the wider world. An accountable Church harnesses the talents of the laity and understands that transparency leads to credibility and increased collections. "Each, by virtue of baptism, is called to help fix this. Everyone leads." (p. 112)

Lowney, Chris. "Fix a disconnect that hobbles the Church." *Crux: Taking the Catholic Pulse* (April 5, 2017). <https://cruxnow.com/church-in-the-usa/2017/04/05/fix-disconnect-hobbles-church/> (accessed May 1, 2017).

"All hands on deck." The Church needs the talent, ideas, imagination, initiative, and dedicated work of the laity. How does the Church empower people to act? Three concrete ways that can easily be implemented immediately: a clear call from the pastor who is standing at the pulpit, invite all parishioners to a

brainstorming session at least twice a year, and be more welcoming (greeters at the door and people in the pews.)

Lowney, Chris. *Heroic Leadership: Best Practices from a 450-Year-Old Company that Changed the World*. Chicago: Loyola Press, 2003.

Jesuit leadership principles translated to the business (and everyday) world. Written by a former Jesuit having extensive experience in international banking (J. P. Morgan). The four pillars are self-awareness, ingenuity, love, and heroism. Leaders understand their strengths, weaknesses, values, and worldview. They begin by leading themselves first. They confidently innovate and adapt to embrace change. Others are positively and lovingly challenged and engaged. They energize and inspire others through heroic ambition. They persist and persevere. They are committed to excellence. “Everyone leads, and everyone can lead all the time.” (p. 94) “Quick-fix” and “command and control” models are rejected. The Jesuit *examen* is embraced. Lowney’s book is unique in that it embraces love as a pillar of leadership.

Lowney, Chris. *Pope Francis: Why He Leads the Way He Leads; Lessons from the First Jesuit Pope*. Chicago: Loyola Press, 2013.

“Authentic power is service.” (p.5) Pope Francis’ habits and convictions are a call to a new way of leading. Lowney identifies six foundational personal commitments: deep self-knowledge, transcend self to serve others, engagement with the complex world to understand reality, daily reflective retreat from the world (*examen*), live fully in the present and honor tradition (present can’t be divorced from past), and help to create the future (freedom to change). Choices must be made with the heart and head. Leaders model direction, influence, choices, and results in whatever platform that life presents to them. Leadership formation takes time and effort.

Lundholm-Eades, Jim. “Dynamic Catholic Leadership: Ten Patterns for Leadership in the Church.” Talk presented at the annual meeting for the Center for the Advancement of Christian Education (CACE), Albuquerque, New Mexico, October 26-30, 2014. Leadership Roundtable. <http://www.theleadershiproundtable.org/TLR/Documents/CACE%202014%20Dynamic%20Catholic%20Leadership.pdf> (accessed January 7, 2016).

Lundholm-Eads offers ten elements of dynamic Catholic leadership: vocational, discerning, aware and insightful, adaptable, connective and collaborative, systemic and multi-dimensional, invites the next generation, and exercised in a space defined by time and Catholic culture. His approach and presentation are rather cluttered and a bit disjointed compared to other authors’ listed in this bibliography. A major (and obvious) takeaway is that Catholic leadership may not be disengaged from Catholic faith and culture.

Maxwell, John C. *The 360° Leader: Developing Your Influence from Anywhere in the Organization*. Nashville: Thomas Nelson, 2011.

The author's premise is that 99% of all leadership occurs from the middle of an organization. Leaders in the middle of an organization are called to influence people at every level: up, down and across. Leaders possess the qualities of, "...adaptability, discernment, perspective, communication, security, servanthood, resourcefulness, maturity, endurance, and countability." (p. 286) This speaks to both Chris Lowney's and Rabbi Sacks' premises that we are all called upon to lead.

McKinney, Michael. "Aristotle on Virtuous Leadership." *Leading Blog*, February 2, 2008.

http://www.leadershipnow.com/leadingblog/2008/02/aristotle_on_virtuous_leadership.html (accessed October 30, 2015).

Virtue, or moral excellence, for leadership is an acquired trait. A leader needs practical wisdom; a concern for how conditions in societies and organizations can be made better.

O'Toole, James. "Advice from Aristotle." Santa Clara University.

<http://www.scu.edu/ethics/publications/submitted/otoole/business-ethics-aristotle.html> (accessed October 30, 2015).

The ethical role of a leader is to create the environment in which all members have an opportunity to reach their own potential. Virtue and wisdom will elude leaders who do not engage in an ethical analysis of their actions.

Rohr, Richard. *Eager to Love*. Cincinnati: Franciscan Media, 2014.

A book of Franciscan spirituality that is highly accessible even for those that have no theological background. Intriguing were his references to leadership, especially spiritual leadership. Servant leadership is styled as bottom-up and inside-out. They are those with conviction that convict others. Patience and compassion are characteristic of spiritual leadership. Church authority is the ability to "author" life in others.

Sacks, Rabbi Jonathon. *Lessons in Leadership: A Weekly Reading of the Jewish Bible*. New Milford, CT: Maggid Books & The Orthodox Union, 2015.

Reflections on leadership from a Jewish reading of the Hebrew Scriptures. The Rabbi notes, "...I began to understand that we are all called on to be leaders within our sphere of influence, be it the family, the community, at work among colleagues, or in play among teammates." (p. xxi) Leadership is not a gift bestowed at birth but something that develops over time. Examples of this are Joseph, Moses, and Judah. Leadership is covenantal and begins with the acceptance of responsibility. "Therefore if we are all responsible for one another, we are all called on to be leaders, each within our sphere of influence – be it within the family, the community, the organisation (*sic*), or a larger grouping still." (p. 179) Leadership transforms leaders by developing "muscles" that they

did not know they had: to take risks, to see the good, to become emotionally intelligent, etc.

Shanker, Thom. "Retiring Army Chief of Staff Warns Against Arrogance." *The New York Times*. June 12, 2003. <http://www.nytimes.com/2003/06/12/us/retiring-army-chief-of-staff-warns-against-arrogance.html> (accessed March 13, 2018).

Referenced by Chris Lowney in his keynote address delivered in Houston at the 2016 National Association of Diaconate Directors' Annual Convention. To be effective, leaders must love the people they lead.

Thomas, Martin. "Why Aristotle's less authoritarian philosophy is the new spirit of business." *The Guardian*. March 27, 2012. <http://www.theguardian.com/sustainable-business/leadership-style-collective-changing-behaviour> (accessed October 30, 2015).

In the perennial debate regarding leadership styles, Aristotle's seems to have it over Plato's command-and-control recommendation. Aristotle espoused a style that is looser, more collaborative, and less authoritarian. He believed that people need a sense of participation in their destiny.

Tully, Shawn. "This pope means business." *Fortune*. August 14, 2014. <http://fortune.com/2014/08/14/this-pope-means-business/> (accessed July 25, 2015).

Five months into his pontificate, Francis summoned a group of seven prominent Catholic financiers, "...to create a plan to restructure the Vatican's scandal-plagued finances." One participant described his approach as, "highly managerial." "Francis declared that sound financial management was a pillar of his greatest mission: aiding the poor and underprivileged." He clearly articulated his strategic vision to the financiers and empowered them to figure out the details. "His central idea was revolutionary: Money matters are not a core competency of the clergy..." Francis knows that the culture of an organization is established at the top. He also knows that, "To serve his higher calling as a pope of the people...he must continue to keep one eye on the bottom line."

Wolf, Notker and Enrica Rosanna. *The Art of Leadership*. Collegeville: Liturgical Press, 2013.

Discussion of leadership qualities from Benedictine (primarily) and Salesian viewpoints. In answer to the question, "Can leadership be taught?" their answer is, "No." The art of leadership can be coached but is of little use if certain character traits (reliability, responsibility, sincerity, perseverance, courage) are not inherent and certain mental abilities (discipline, patience, composure, sense of humor) are not acquired. Leadership skills may be developed through self-awareness (maturity and honesty), self-restraint (humility) and the gifts of prudence, patience, and courage. Love of people (courtesy, listening, respect, trust and conversation) is essential. Leaders may not fall prey to the temptations of power. The abbot and sister subscribe to collaborative forms of leadership.

Sister believes that we must strive for a culture that speaks with both male and female voices

Catholic Teachings

Byron, William J. "Ten Building Blocks of Catholic Social Teaching." *America: The National Catholic Weekly*. October 31, 1998.
<http://www.americamagazine.org/issue/100/ten-building-blocks-catholic-social-teaching> (accessed August 2, 2015).

Since there are no official counts, the author proposes 10 Catholic social principles: human dignity, respect for human life, association, participation, preferential protection for the poor and vulnerable, solidarity, stewardship, subsidiarity, human equality, and the common good. Intentionally uses the word, "principle" rather than "value" as "principle" connotes or implies a fundamental idea that leads to something else.

Catholic-pages.com. "Laborem Exercens: Summary." catholic-pages.com. September 14, 1981. http://www.catholic-pages.com/documents/laborem_exercens-summary.asp (accessed August 2, 2015).

Reflection on Pope St. John Paul II's *Laborem Exercens*. Work is a fundamental dimension of life on earth and a participation in God's creative activity.

Code of Canon Law: Latin-English Edition. Washington, DC: Canon Law Society of America, 1989.

The Code echoes the documents of Vatican Council II. Lay persons are a gift to the Church in terms of talent and service. Canons 1284, 1286, and 1287 detail the work of Church administration.

Compendium of the Social Doctrine of the Church. Washington, D.C.: United States Conference of Catholic Bishops, 2004.

Compilation of Catholic social teaching of Scripture, the Church Fathers, Church councils, papal encyclicals, etc.

Gaillardetz, Richard R. and Catherine E. Clifford. *Keys to the Council: Unlocking the Teaching of Vatican II*. Collegeville, MN: Liturgical Press, 2012.

A summary of the key points from Vatican II. I am appreciative of the illustration at the beginning of the book that diagrams the priority of the documents. There are four core constitutions centered on the call to holiness with two of the four foundational (*Sacrosanctum Concilium* and *Dei Verbum*).

John Paul II. *Christifideles Laici* (Apostolic Exhortation on the Vocation and the Mission of the Lay Faithful in the Church and in the World). 30 December 1988. The Holy See. http://w2.vatican.va/content/john-paul-ii/en/apost_exhortations/documents/hf_jp-ii_exh_30121988_christifideles-laici.html (accessed March 16, 2016).

Addressed to the bishops, priests, deacons, and all lay faithful. It echoes the words of Vatican Council II. Pope St. John Paul II couches his words in the imagery of the Parable of the Laborers in the Vineyard. He noted that the Council Fathers have called all the lay faithful to serve in the Lord's vineyard. He exhorts the laity to active, conscientious, and responsible involvement in the mission of the Church. "It is not permissible for anyone to remain idle." (sec. 3) Their role is essential and not replaceable: to make the Church of Christ present in the various sectors of the world, as a sign and source of hope and love.

John Paul II. *Laborem Exercens* (Encyclical Letter on Human Work). 14 September 1981. The Holy See. http://w2.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_14091981_laborem-exercens.html (accessed August 2, 2015).

Written on the near-occasion of the 90th anniversary of *Rerum Novarum*. Humanity is called to work from the very beginning of the existence of the world. "Work is one of the characteristics that distinguish man from the rest of the creatures, whose work for sustaining their lives cannot be called work." (Blessing) And further, "The Church considers it her task always to call attention to the dignity and rights of those who work, to condemn situations in which that dignity and those rights are violated, and to help to guide the above-mentioned changes so as to ensure authentic progress by man and society." (sec. 1) This encyclical is certainly addressed to those engaged in secular employment. There are provocative questions when this is redirected to the Church as employer. How well does the Church do this within her own administrative organization? Are there clear paths to authentic progress or stumbling blocks that include tradition and Canon Law?

Meuser, Bernhard, project manager and editor. *DOCAT: What to do? The Social Teaching of the Catholic Church*. Clara Steber, project assistant. San Francisco: Ignatius Press, 2016.

This book on Catholic social teaching is targeted to the youth of the Church. Its teachings regarding the value of human work are concise and it chronologically traces the thought of the Church from *Rerum Novarum* through *Evangelii Gaudium* on pages 152-155.

O'Collins, Gerald, SJ. *Living Vatican II: The 21st Council for the 21st Century*. Mahwah, NJ: Paulist Press, 2006.

The "Magna Carta" of the laity is Pope John Paul II's exhortation, *Christifideles Laici*. It builds on Vatican Council II's vision for the laity. The Pope develops *koinonia* as, "Characterized by 'diversity and complementarity of

vocations and states of life, of ministries, of charisms and responsibilities.” (p. 160).

O'Malley, John W. *What Happened at Vatican II*. Cambridge, MA: The Belknap Press of the Harvard University Press, 2008.

O'Malley notes that the overall tenor of the documents produced by this council is pastoral and spiritual; a significant break from tradition. Among the most important issues of the council was, “The desire to recognize the dignity of lay men and women and to empower them to fulfill their vocation in the church...” (p. 5). In an amazing example of self-awareness at the group level, Cardinal Suenens called for the immediate implementation of two recommendations in upcoming meetings: increase the number of lay auditors and see to it that the increment included women, “Who”, he noted, “lest I am mistaken, make up half of the human race.” (p. 187). Fifteen women were invited to participate as auditors before the third session began in 1964.

Pope Paul VI. Address of Pope Paul VI During the Last General Meeting of the Second Vatican Council. 7 December 1965. The Holy See.

https://w2.vatican.va/content/paul-vi/en/speeches/1965/documents/hf_p-vi_spe_19651207_epilogo-concilio.html (accessed October 1, 2016).

The Pope's words offer some insight into the hierarchical weight of the Vatican II documents, especially the core documents. How are they to be held by the faithful? Are they dogma? Doctrine? He says in this document, “But one thing must be noted here, namely, that the teaching authority of the Church, even though not wishing to issue extraordinary dogmatic pronouncements, has made thoroughly known its authoritative teaching on a number of questions which today weigh upon man's conscience and activity, descending, so to speak, into a dialogue with him, but ever preserving its own authority and force...” (par. 16). About as clear as mud. Apparently, they are not dogmatic pronouncements.

Pope Paul VI. *In Spiritu Sancto* (Apostolic Brief for the Closing of the Council). 8 December 1965. The Holy See. http://w2.vatican.va/content/paul-vi/en/apost_letters/documents/hf_p-vi_apl_19651208_in-spiritu-sancto.html (accessed February 7, 2017).

As for the hierarchical weight of the documents of Vatican II, Pope Paul VI notes, “We decided moreover that all that has been established synodally is to be religiously observed by all the faithful, for the glory of God and the dignity of the Church and for the tranquillity (*sic*) and peace of all men.” Clearer than his 7 December address. It would certainly seem that the faithful are expected to accept these documents as authoritative doctrine.

United States Conference of Catholic Bishops. “Catholic Social Teaching.” USCCB. Washington, DC, 2015. <http://www.usccb.org/beliefs-and-teachings/what-we-believe/catholic-social-teaching/> (accessed August 2, 2015).

“Catholic social teaching is a central and essential element of our faith.” We who share God's image are called to build relationships of love and justice.

United States Conference of Catholic Bishops. "The Dignity of Work and the Rights of Workers." USCCB. Washington, DC, 2015. <http://www.usccb.org/beliefs-and-teachings/what-we-believe/catholic-social-teaching/the-dignity-of-work-and-the-rights-of-workers.cfm> (accessed August 2, 2015).

"The economy must serve people, and not the other way around." Work is one way of participating in God's continuing creative activity.

United States Conference of Catholic Bishops. "Seven Themes of Catholic Social Teaching." USCCB. Washington, DC, 2015. <http://www.usccb.org/beliefs-and-teachings/what-we-believe/catholic-social-teaching/seven-themes-of-catholic-social-teaching.cfm> (accessed August 2, 2015).

The USCCB offers seven themes that are at the heart of Catholic social teaching: life and dignity of the human person; call to family, community, and participation; rights and responsibilities; option for the poor and vulnerable; the dignity of work and the rights of workers; solidarity; and care for God's creation. Unfortunately, some of these categories are not necessarily self-descriptive. "Stewardship" falls in the category of "care for God's creation."

United States Conference of Catholic Bishops. "Stewardship." USCCB. Washington, DC, 2015. <http://www.usccb.org/beliefs-and-teachings/what-we-believe/stewardship/index.cfm> (accessed August 2, 2015).

A summary of the USCCB's Pastoral Letter on Stewardship. Stewardship is the safeguarding and responsible use of material and human resources. It is the generous giving of time, talent, and treasure. "As Christian stewards, we receive God's gifts gratefully, cultivate them responsibly, share them lovingly in justice with others, and return them with increase to the Lord." A Christian steward models his or her life on the life of Jesus.

United States Conference of Catholic Bishops. *Stewardship: A Disciple's Response*. USCCB. Washington, DC, 2002. <http://www.usccb.org/upload/stewardship-disciples-response-10th-anniversary.pdf> (accessed May 10, 2016).

This Pastoral Letter challenges the reader to embrace stewardship as an expression of Christian discipleship. Stewardship is introduced as an all-encompassing way of life characterized by service to others and to the world. Everything is of God. The gifts bestowed, in a unique way, upon each individual are meant to move one to gratitude and are to be shared with others and returned to the Father with an increase. The gifts and resources of the earth are to be cherished, put to responsible use, or otherwise protected. The bishops paint the notion of stewardship with a broader brush but circle back to "time, talent, and treasure" at the end of this Letter.

Vatican Council II. “*Apostolicam Actuositatem* (Decree on the Apostolate of Lay People).” In *Vatican Council II: The Basic Sixteen Documents*, edited by Austin Flannery, OP. Northport, NY: Costello Publishing Company, 2007.

John O’Malley, in his book *What Happened at Vatican II*, noted that one of the most important issues of the council was the desire to recognize the dignity of the laity and to empower them to take up their vocations in the church. It sailed through the council and was approved with little disagreement. In this document are found the words that the laity share in the priestly, prophetic, and kingly office of Christ. The laity have received charisms that are to be shared with the Church and the world.

Vatican Council II. “*Christus Dominus* (Decree on the Pastoral Office of Bishops in the Church).” In *Vatican Council II: The Basic Sixteen Documents*. Edited by Austin Flannery, OP. Northport, NY: Costello Publishing Company, 2007.

This Decree, in a reference to the work of the Roman Curia, encourages, “...frequent recourse to the advice of lay people distinguished for virtue, knowledge and experience so that they also may have an appropriate role in the affairs of the church.” (Sec. 10)

Vatican Council II. “*Lumen Gentium* (Dogmatic Constitution on the Church).” In *Vatican Council II: The Basic Sixteen Documents*. Edited by Austin Flannery, OP. Northport, NY: Costello Publishing Company, 2007.

This Dogmatic Constitution, a core document of the Council, recovers an ancient theology of the priesthood of the baptized and calls the laity to engage in the affairs of the world according to God’s will and to collaborate with clergy. “The pastors, helped by the experience of the laity, are enabled to judge more clearly and more appropriately in spiritual and in temporal matters. Strengthened by all its members, the church can thus more effectively fulfill its mission for the life of the world.” (Sec. 37) Of all the conciliar documents, *Lumen Gentium* offers the most theology of the laity.

Vatican Council II. “*Sacrosanctum Concilium* (Constitution on the Sacred Liturgy).” In *Vatican Council II: The Basic Sixteen Documents*. Edited by Austin Flannery, OP. Northport, NY: Costello Publishing Company, 2007.

This core document of the Council calls all to participate and share in the divine life. “Thus by Baptism men and women are implanted in the paschal mystery of Christ; they die with him, are buried with him, and rise with him...” (sec. 7).

Theology and Spirituality

Boring, M. Eugene. “The Gospel of Matthew: Introduction, Commentary, and Reflections.” In *The Gospel of Matthew; The Gospel of Mark*. Vol. VIII of *The New Interpreter’s Bible: General Articles & Introduction, Commentary, & Reflections for Each Book of the Bible Including the*

Apocryphal/Deuterocanonical Books in Twelve Volumes. Edited by Leander E. Keck, et al. Nashville: Abingdon Press, 1995.

Grace beyond imagining is the take-away from the Parable of the Unforgiving Servant. The debt may have been incurred through mismanagement of the king's resources or contracting to raising taxes from subject nations. It was not the result of personal expenditures. In any case, it is a wholly unrealistic sum. The king does the unthinkable twice: first by forgiving the extraordinary debt and, second, by taking back the forgiveness.

Bovon, Francois. *Luke 2: A Commentary on the Gospel of Luke 9:51-19:27*. In *Hermeneia - A Critical and Historical Commentary on the Bible*. Edited by Helmut Koester. Translated by Donald S. Deer. Minneapolis: Fortress Press, 2013.

A very rich commentary on the Parable of the Dishonest Steward. In some respects, the exegesis may have been a tiny bit stretched when it comes to the degree of dishonesty. What does the parable mean? Is it about material goods or about insolent resourcefulness? "In a Christian community in the process of organization, stewardship represented a primary concern not only to the church but also to the family, society in general, and especially the private sector. Wise organization and good leadership are for that matter of concern not only to the church but also to the family, society in general, and especially the private sector." (p. 447)

Brueggemann, Walter. *Genesis. Interpretation: A Bible Commentary for Teaching and Preaching*, edited by James L. Mays. Atlanta: John Knox Press, 1982.

Detailed commentary by one who teaches and preaches. "God authors life but there is no hint of authoritarianism."

Cafferky, Michael E. "Toward a Biblical Theology of Efficiency." *The Journal of Biblical Integration in Business* 16, no. 2 (Fall 2013): 41-60.
http://knowledge.e.southern.edu/cgi/viewcontent.cgi?article=1036&context=faeworks_bus (accessed September 4, 2015).

Protestant author with a bent for a theology of prosperity, "It is the thesis of this paper that the Bible encourages the pursuit of operational efficiency within the constraints of moral principles designed to foster abundant living in all dimensions considered important in the Bible: social, physical, spiritual, political, and economic." The paper explores the themes of creation and covenant. It also reviews instrumental values (virtues) relevant to the achievement of efficiency: truth, wisdom, prudence, usefulness, and stewardship. The author indicates that efficiency and productivity are synonyms in the common parlance. It may be more accurate to state that efficiency may be associated with inputs in a given process and that productivity references the outcome of a given process. Many times there is a direct correlation between the two.

Conzelman, Hans. "1 Corinthians: A Commentary on the First Epistle to the Corinthians." In *Hermeneia: A Critical and Historical Commentary on the Bible* series. Edited by George W. MacRae, SJ. Translated by James W. Leitch. Philadelphia: Fortress Press, 1975.

Conzelman brings up the figure of the helmsman in this commentary. Administration as piloting!

Corrigan, George, OFM. "Parable of the Talents: a disturbing story." friarmusings.wordpress.com. November 15, 2014. <https://friarmusings.wordpress.com/2014/11/15/parable-of-the-talents-a-disturbing-story/> (accessed August 4, 2015).

The servant's timidity and lack of enterprise (laziness?) are condemned. Even if his strategy was to play it safe, he had achieved nothing.

Culpepper, R. Alan. "The Gospel of Luke: Introduction, Commentary and Reflections." In *The Gospel of Luke; The Gospel of John*. Vol. IX of *The New Interpreter's Bible: General Articles & Introduction, Commentary, & Reflections for Each Book of the Bible Including the Apocryphal/Deuterocanonical Books in Twelve Volumes*. Edited by Leander E. Keck, et al. Nashville: Abingdon Press, 1995.

Overall, a very approachable commentary for this parable that is an exegetical challenge. The words that leap from the Parable of the Dishonest Steward are that whoever is faithful in very little is faithful also in much and vice-versa!

Fairchild, Mary. "What is a Talent?" *christianity.about.com* (December 10, 2014). <http://christianity.about.com/od/glossary/a/Talent.htm> (accessed January 8, 2016).

A talent represents a large sum of money. "According to *New Nave's Topical Bible*, one who possessed five talents of gold or silver was a multi-millionaire by today's standards. Some calculate the talent in the parables to be equivalent to 20 years of wages for the common worker."

Fischer, Mark F. "The Donatist Controversy and a Local Theology of Church Management." In *The Parish Management Handbook*, edited by Charles E. Zech, 11-30. Mystic, CT: Twenty-Third Publications, 2003.

Fischer proposes Karl Rahner's parochial principle as the inner foundation of a local theology of church management. Rahner noted that the parish is the highest degree of actuality of the total Church. The parish is the "event" of the universal Church and those that lead and manage help make the parish a sign and instrument of communion.

Francis. *Laudato Si': On Care for Our Common Home*. Huntington, IN: Our Sunday Visitor Publishing Division, 2015.

All is interconnected and interrelated. The Pope offers a theology of relationship toward the end of this encyclical. St. Bonaventure challenges that reality be read in a Trinitarian key. "The divine persons are subsistent relations,

and the world, created according to the divine model, is a web of relationships.” (Sec. 240)

Fretheim, Terence E. “The Book of Genesis: Introduction, Commentary, and Reflections.” In *General & Old Testament Articles; Genesis; Exodus; Leviticus*. Vol. VI of *The New Interpreter’s Bible: General Articles & Introduction, Commentary, & Reflections for Each Book of the Bible Including the Apocryphal/Deuterocanonical Books in Twelve Volumes*. Edited by Leander E. Keck, et al. Nashville: Abingdon Press, 1994.

Commentary on the first account of creation, etc. Fretheim draws attention to the unity and comprehensiveness of the seven day structure used in the account as well as its discernable rhythm.

Gallaher, Brandon. “Chalice of Eternity: An Orthodox Theology of Time.” [www.bogoslov.ru. http://www.bogoslov.ru/cn/text/2668945.html](http://www.bogoslov.ru/cn/text/2668945.html) (accessed August 2, 2015).

This is very dense conceptualization of time. The take-away for this project is that time is connected to creation. We are therefore called to be stewards of time as we are called to be stewards of creation.

Garrido, Ann M. “More Than a Desk Job: The spirituality of administration.” *America: The National Catholic Review*. July 6, 2009. <http://americamagazine.org/issue/702/article/more-desk-job> (accessed December 16, 2015).

Garrido proposes that the work of administration can be an activity that is transformative of self and others and not one that sucks the light and life out of good people. It is a call to greatness of vision (the “big picture”), to love freely and abundantly, to humble courage, and to die to self (ego and control). “Administration as a call from God and the church has the potential to make more of us.” (last paragraph)

Garrido, Ann M. *Redeeming Administration: 12 Spiritual Habits for Catholic Leaders in Parishes, Schools, Religious Communities, and Other Institutions*. Notre Dame, IN: Ave Maria Press, 2013.

There is no dichotomy between administration and ministry. Administration has been seen as a ministry from the time of St. Paul. Administrators are in service to others and are agents of transformation. The author hypothesizes that the ministry of administration cultivates 12 key virtues, dispositions, or spiritual habits: breadth of vision, generativity, trust, agape, integrity, humility, courage, reflection, humor, forgiveness, the embrace of death, and hope. She also very neatly distinguishes between leadership and administration. “Leadership tilts toward the creation of vision and policy...administration tilts toward the execution and management of vision and policy...rigid boundaries between the two need not be drawn.” (p.6).

Garrido, Ann M. *Redeeming Conflict: 12 Spiritual Habits for Christian Leaders*. Notre Dame, IN: Ave Maria Press, 2016.

Conflicts are inevitable and, while painful, are opportunities for growth. The author proposes 12 behavioral choices, that, when practiced regularly, become characteristic of the person who practices them: sidestep triangulation (victim, villain, and rescuer), seek truth by being curious, listen with genuine interest toward understanding, charitable interpretation, welcome emotion but drawing a boundary with respect to certain forms of expressing emotion, speak up with gentleness and reverence, know yourself, be forgiving, repent, solve problems, be trustworthy (not necessarily trusting), and practice prudence. "It turns out redeeming conflict is not about *fixing* conflict but managing it in such a way that we rob it of the power to divide and fragment while heightening its power to educate and illumine." (p. 260).

Harrington, Daniel J., SJ. *The Gospel of Matthew*. Vol. 1 of *Sacra Pagina Series*. Edited by Daniel J. Harrington, SJ. Collegeville, MN: The Liturgical Press, 2007.

Fr. Harrington's commentary focuses on the eschatological character of the Parable of the Talents.

Jewett, Robert. *Romans: A Commentary*. In *Hermeneia: A Critical and Historical Commentary on the Bible* series. Edited by Eldon Jay Epp. Minneapolis: Fortress Press, 2007.

Another listing of charisms but the list does not include administration. It does, however, speak to leadership. Jewett provides historical commentary on the phrase, "...one who is over others."

Johnson, Luke Timothy. *The Gospel of Luke*. Vol. 3 of *Sacra Pagina Series*. Edited by Daniel J. Harrington, SJ. Collegeville, MN: The Liturgical Press, 1991.

Commentary on Luke's Gospel. When it comes to knowing a tree by its fruit, character precedes action.

Leiva-Merikakis, Erasmo. *Fire of Mercy, Heart of the Word: Meditations on the Gospel According to Saint Matthew, Volume Two (Chapters 12-18)*. San Francisco: Ignatius Press, 2003.

An incomparable meditation on the Gospel of Matthew that is from the mind and the heart. It is scholarly, prayerful, and approachable all at once. Brother Simeon offers perspectives on the Parable of the Unforgiving Servant. Particular is the king's behavior at the beginning of the parable. He yields instantaneously to the servant's plea. (Just like that!) He dismisses the entire, extraordinary sum of money. What moved the king to such a drastic change of attitude?

Leiva-Merikakis, Erasmo. *Fire of Mercy, Heart of the Word: Meditations on the Gospel According to Saint Matthew, Volume Three (Chapters 19-25)*. San Francisco: Ignatius Press, 2012.

Brother Simeon offers vertical and horizontal perspectives on the Parables of the Workers in the Vineyard and Talents. In the Parable of the Workers in the Vineyard, the householder seeks to change human hearts by transforming them according to the pattern of his own heart. In the Parable of the Talents, Brother Simeon considers the theme of trust.

Levine, Amy-Jill. *Short Stories by Jesus: The Enigmatic Parables of a Controversial Rabbi*. New York: HarperOne, 2014.

An engaging volume of reflections written from the perspective of a Jewish scholar. Ms. Levine reminds her readers that parables are intentionally provocative and do not lend themselves to simplistic interpretations and platitudes. Less concern should be given to allegorical meaning and more given to what they can effect. She notes that the parables echo the themes of Jesus' other teachings and debates, including a concern for economic matters. "The parables, with their attention to wealth management, debts, daily wages, land ownership, and lost coins speak to the same concerns." (p. 11) She reflects from an economic perspective on the Parable of the Laborers in the Vineyard found in Matthew's Gospel. This parable afflicts and has lessons for workers and for those that hire them.

Luz, Ulrich. "Matthew 8-20: A Commentary." In *Hermeneia – A Critical and Historical Commentary on the Bible*. Edited by Helmut Koester and translated by James E. Crouch. Minneapolis: Fortress Press, 2001.

Commentary on the Parable of the Unmerciful Debtor. The first debtor owes the king 10,000 talents, a fantastic sum of money, but is unable to repay the debt. When the king orders him and all that is his sold, he seeks a "reprieve" and some "patience." Given the amount, it is a very fair conclusion to make that it would be impossible for the debtor to repay the sum. In a surprising turn of events, the king forgives the debt. What is scandalous is that the first debtor does not pay the favor forward as he seeks repayment of a much smaller sum owed to him.

Luz, Ulrich. "Matthew 21-28: A Commentary." In *Hermeneia – A Critical and Historical Commentary on the Bible*. Edited by Helmut Koester and translated by James E. Crouch. Minneapolis: Fortress Press, 2005.

Commentary on the Parable of the Talents. The parable is about people who do little. The slaves receive different sums of money, corresponding to their own abilities. The gains earned by the first two are exceptionally high and may have been made in dealing with commodities or speculating in land and not bank interest. They are rewarded with greater responsibility. When called for an accounting by the master, the third slave's speech fluctuates among defiance, protest, and fear. He is criticized for being wicked and fearful but not lazy. He did not even try to succeed.

Martin, James SJ. "You had to be there." *Boston College Magazine*. Summer 2012. http://bcm.bc.edu/issues/summer_2012/c21_notes/you-had-to-be-there.html (accessed August 4, 2015).

Incongruity, exaggeration, and hyperbole are characteristic of Jesus' parables. Early audiences would have laughed at Jesus' intentionally ridiculous illustrations. In the parable of the talents, "The idea of a wealthy man handing over to a servant 75 years worth of wages would have touched the sense of the ridiculous in his hearers."

Meier, John P. *Probing the Authenticity of the Parables*, Vol. 5 of *A Marginal Jew: Rethinking the Historical Jesus*. New Haven: Yale University Press, 2016.

John Meier seeks to identify those parables that have a solid claim of having come from the historical Jesus. Among these is the Parable of the Talents. In footnotes #140 and #160, Fr. Meier offers his own very sensible commentary about the Parable of the Talents and the meaning of "talent" as a financial measure in footnote #137. "It is almost hopeless to give an exact monetary equivalent of the ancient 'talent' in present-day American dollars... The monetary value of one talent would have been around six thousand denarii, the denarius in turn being the daily wage of a day laborer or an ordinary soldier. If we suppose, with Hultgren, that a day laborer would have worked some three thousand days a year, the value of one talent would have approached twenty years of wages." The sums involved in this Parable and the Parable of the Unmerciful Servant are immense.

Mills, Andy. "How Should We Work as Christians." [www.theologyofwork.com](http://www.theologyofwork.org/about/how-should-we-work). <http://www.theologyofwork.org/about/how-should-we-work> (accessed August 2, 2015).

"Theology of Work" appears to be a Protestant project. The goal of this organization is to bring the Bible to bear on what work should be. Notable in Mills' list are several thoughts. Point #3 is that, "God calls people to every kind of legitimate work and gives us skills and talents to fulfill the work." Further, that we are responsible for the quality, character, and ethics of our work and that it should be centered on service to others.

Sampley, J. Paul. "The First Letter to the Corinthians: Introduction, Commentary, and Reflections." In *Acts; Introduction to Epistolary Literature; Romans; I Corinthians*. Vol. X of *The New Interpreter's Bible: General Articles & Introduction, Commentary, & Reflections for Each Book of the Bible Including the Apocryphal/Deuterocanonical Books in Twelve Volumes*. Edited by Leander E. Keck, et al. Nashville: Abingdon Press, 2002.

A very approachable commentary on Paul's enumeration of the spiritual gifts that includes the charism of administration. The Spirit works in surprising ways!

Sarna, Nahum M. *The JPS Torah Commentary: Genesis*. Philadelphia: The Jewish Publication Society, 1989.

A Jewish perspective on the story of creation. Sarna draws attention to the obvious orderliness, harmony, and symmetry of the account. The story of creation is unique (for its time) in its economy of words. “The narration is marked by compactness, solemnity, and dignity.” (p. 3) It progresses systematically from chaos to cosmos. And from from inorganic matter to humankind, the highest form of life.

Schmutzer, Andrew and Alice Mathews. “Genesis 1-11 and Work.” www.theologyofwork.com. <https://www.theologyofwork.org/old-testament/genesis-1-11-and-work> (accessed August 2, 2015).

The first work is that of creation and a prototype for all that follows. “Laboring in God’s image, we work *in* creation, *on* creation, *with* creation and-if we work as God intends-*for* creation.”

Senior, Donald, CP. *The Gift of Administration: New Testament Foundations for the Vocation of Administrative Service*. Collegeville: Liturgical Press, 2016.

“...Administration has as legitimate a claim on the Gospel and the Christian mission as does the more explicit and easily identified work of preaching or teaching or healing.” (p. xxvi). The author considers how the essential elements of the work of administration are rooted in the Christian biblical and theological heritage: the importance of “institution,” leadership, mission awareness and planning, the importance of a sense of community in the workplace for productivity and efficiency, and finances and fundraising as critical to the common good. He holds out Anne Garrido’s *Redeeming Administration: 12 Spiritual Habits for Catholic Leaders in Parishes, Schools, Religious Communities, and Other Institutions* and Pope Francis’ “Presentation of the Christmas Greetings to the Roman Curia...” as virtues to strive for and vices to guard against, respectively, for those engaged in the work of administration. In short, administrators are to give life and meaning to God’s people, even in secular organizations.

Tice, Richard. “Bekahs, Shekels, and Talents: A Look at Biblical References to Money.” *Ensign*. August, 1987. <https://www.lds.org/ensign/1987/08/research-and-perspectives?lang=eng> (accessed January 8, 2016).

A denarius was the standard wage for a day’s labor in Jesus’ time. A laborer would have to work 6,000 days (over 19 years) to earn a talent

TOW Bible Commentary. “The Parable of the Talents (Matthew 25: 14-30).” www.theologyofwork.com. <https://www.theologyofwork.org/new-testament/matthew/living-in-the-new-kingdom-matthew-18-25/the-parable-of-the-talents-matthew-2514-30> (accessed August 2, 2015).

The parable concerns money. This commentary’s endnote indicates that an NRSV footnote, “ ‘...A talent was worth more than 15 years’ wages of a laborer,’ in other words, about \$US 1 million in today’s currency.”